

The Empire Strikes Back?

December 22, 2025

Featuring Tal Kelman

Hosted by Mark Dubowitz

DUBOWITZ: Welcome back to The Iran Breakdown. My guest today is a man who knows the Islamic Republic of Iran, not just from intelligence files, but from the cockpit of a fighter jet. Retired Major General Tal Kelman, one of Israel's most accomplished fighter pilots and strategists. And now, I'm proud to say, my colleague at FDD [Foundation for Defense of Democracies]. After nearly four decades of uniform, Tal has thousands of hours in F-35s and other fighter jets. He's helped bring the F-35 in operational service and ultimately became the general responsible for Israel's Iran file, shaping intelligence, planning long-range operations, and coordinating Israel's strategic posture towards Tehran. And when it comes to Operation Rising Lion and the 12-Day War, he wasn't just behind the planning – he flew missions and those strikes himself. Now, as the Islamic Republic absorbs the shock of Israel's air campaign and confronts mounting internal and external pressure, I want to know: what did Israel's last air campaign really accomplish?

What's the status of Iran's nuclear program? What comes next?

I'm your host, Mark Dubowitz. This is The Iran Breakdown. So, let's break it down. Tal, welcome. It's wonderful to have you on the show.

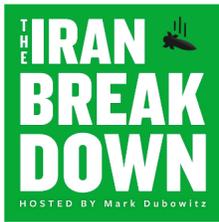
KELMAN: Great to be here, Mark. Thank you very much.

DUBOWITZ: So, Tal, we always begin these episodes with the guest's life story, and you've had a remarkable life story. So, I want to know how did you – where are you from? A little bit of information about your family. How did you end up strapped in a cockpit in a fighter jet during the 12-Day War? And tell us a little bit about your remarkable personal and professional life.

KELMAN: Okay. Thanks, Mark. I'm 57 years old, married. I have three daughters. I'm originally from Kibbutz Kfar HaNassi in the north. My parents at some point decided to leave the kibbutz. I joined the military at the age of 18, didn't have any specific dream, wasn't thinking about flight course, but I was recruited for joining the flight course and I said, "Okay, I'll join, probably be out of the course in a month or two months as happens to most people." But actually, you know, during the course, managed to pass stage by stage and grew more and more enthusiastic about flying.

Finished the flight course and then did a career in the Air Force as a vice squadron commander, and as a fighter pilot. I finished as a fighter pilot and did my career as a young fighter pilot and then commander, twice squadron commander, twice base commander. I was commander of the Air Force academy. I commanded two wings in the IDF headquarters and my last position in the Air Force was chief of staff of the Air Force, the number two in command. And then I switched for the first time out of the Air Force to the General Staff, the IDF General Staff. There I did two positions. One was head of the strategic division, and I was actually in charge of all the long-term strategic planning in the IDF. And my last three and a half years, as a two-star general, was the J5 [Strategic Planning and Cooperation Directorate]. I was head of the Iran and Strategy Directorate, and I actually held three files.

One was the Iran file in the IDF. The second was all the international corporation the IDF has with foreign militaries. There I dealt with two main projects. One was opening all the new military relationships between the IDF and militaries in the region after the Abram Accords. And the second was with the American military and the transfer of Israel from the European Command to Central Command. So that was my second file. The third file was all the strategic planning that I commanded before – in the division – they were under me. I did that for three and a half years and I finished my position 10 days before the war started. During all those years, I flew as a fighter pilot on F-16s, F-15s. And 2016 or 2017, when the first F-35s landed in Israel, I was the chief of staff of the Air Force. And we then decided as the two senior commanders in the Air Force, the Air Force commander and the chief of staff will fly on the F-35.



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Two reasons: one is that we felt it was very important for us to understand this new fifth generation jet so that then when we take operational or other decisions, we understand what we're talking about. And the second thing is that we couldn't avoid the temptation of having the opportunity to fly an F-35. So, that's, you know, shortly about my career.

I finally – I found myself in a very unique situation on the 7th of October. I finished my position as a two-star general, so I was on the way to retire. The war began. I'm an operational pilot in F-35, but I'm not needed in the headquarters like I was for many years. So actually, since the 7th of October, I just went to the squadron, and I have been flying for two years in the war. It's pretty unique because I'm way over maximum age that we usually fly. It's not typical for two-star generals to fly operational flights or in a war, especially not F-35's. So, as a whole, it was the last two years of my flying career, which were very, very challenging, like, from a professional point of view.

DUBOWITZ: So, Tal, even more impressive than your career is you speak English with what sounds like a perfect Scottish or English accent and not a typical Israeli accent. Tell us a little bit about your family and your family history.

KELMAN: Yeah. Well, my parents are British. My father is from Glasgow. My mother's from Manchester. They did *Aliyah* in 1968 when my mother was pregnant with me. So, I was born in Israel. They did the Eliyahu Kibbutz in the north.

DUBOWITZ: And what? Sort of inspired by Israel's success after the Six-Day War or...?

KELMAN: They were brought up in, I think, Zionist homes. So, it was pretty obvious that that's a move that they're going to make once they become mature. They met abroad, decided to marry. My father came here first, then came back – went back to Britain to marry my mother, and then they came together to the kibbutz. So basically, they spoke to me English – I speak with my parents' English up till today. And when I was five years old, we, like, did a three-year, what we call *shlichot* in London for three years. So, I did my first three grades in London. So that's where my – so, I don't have a Scottish accent. I have a British accent. I just don't have an Israeli accent, I think.

DUBOWITZ: And you grew up on Kibbutz HaNassi, near – in the north, near –

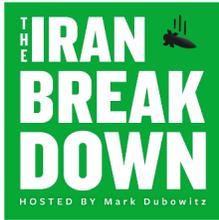
KELMAN: Kibbutz Kfar HaNassi is beside Rosh Pinna, yeah.

DUBOWITZ: Ah, right, near Rosh Pinna. Yes, I've been there. It's a wonderful place.

KELMAN: Yeah.

DUBOWITZ: All right. So, let's talk a little bit about the 12-Day War. I was privileged to sit through a number of briefings by your colleagues and former colleagues in the years leading up to the 12-Day War. And there were certainly best-case scenarios, medium case scenarios, worst case scenarios that, at least, were being presented, at least, you know, publicly to external people like me. But it seems to me that Israel exceeded even the IAF's [Israeli Air Force] best-case scenarios in the 12-Day War. First of all, do you agree with that? And second, why? Is that a function of incredible Israeli planning and capabilities? Is it a function of the fact that the Iranians were completely unprepared or that their capabilities were really exaggerated by American and Israeli operational plannings? What happened that gave Israel such remarkable success during those 12 days?

KELMAN: Yeah. Well, first of all, for the first part of the question, I totally agree it was the best-case scenario operationally, the best-case scenario that I could have imagined. And when we were talking about planning and outcomes of the war and the length of the war and the achievements in the war, yeah, best-case scenario. But I think it's very interesting to then say, "Okay, why?" To go back a bit and see how we got to the – I mean, best-case scenario, yes, by far. I think even best than the best-case scenarios I imagined, but I think we need to look at the way we got to this operation.



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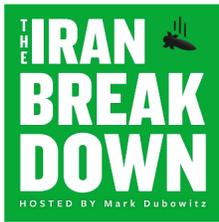
Since the end of the '90s, the beginning 2000s, understanding that Iran is building a secret nuclear – or has – a secret nuclear program, Israel – the Israeli IDF and IAF put it on the table and started making plans. So, I was a squadron commander in 2003, and from 2003, we started planning and we started training. So, what happened in 2025 is something like over 20 years of force buildup, planning, and training. That's one thing. The second thing is that for many years, we were focused on the fact that we might have to deal with the Iranian nuclear program, but as time went by, we understood that there is no single operation against a nuclear facility like there was in the previous operations in Iraq or in Syria. When you're talking about the Iranian challenge, it actually means that you need to get ready for a direct war between Israel and Iran.

And that's a big – it's a simple to say, it's difficult and it has a lot of implications, which means that the Israeli IDF needs to get ready for a full-scale direct war with Iran. And when I say Iran, I mean Iran and all its proxies. It means you need to get ready for a war with Iran, but at the same time, Iraq – the militias in Iraq – Syria, Hezbollah, obviously, assuming the Hamas, if that kind of thing will happen, will join the Houthis. And that is the point that I think when you say, "Okay, how come was it so successful, even more successful?" The description that I gave you of what we planned for was not the reality in June 2025 because we reached the situation when we had already hit Hamas very, very hard and Hamas was not really relevant for joining any war with Iran.

Hezbollah was hit very, very hard and was in no way in a situation to join. The Assad regime had fallen. So basically, Israel found itself where we have total air superiority. There is no air defense in Lebanon. There is no air defense in Syria, and Israel has total air superiority from Israel to the border between Iraq and Iran. And that made it, I would say, or that created conditions that were far better and easier than we planned for. So that enabled Israel to conduct a war, fly many times over back and forth, a few times a day, with no threat until, you know, we enter Iran. And that is operationally, that is, I would say, the planner's dream. That is one thing. The second thing that I think has evolved dramatically in the past few years is the corporation between Israel and the US. And as I said, part of my portfolio in my previous job was the transfer of Israel from European Command to Central Command.

And in the past three, four years since that transfer has happened, many glass ceilings have been broken in the U.S.- Israel military corporation. First of all, very intimate relationships between commanders, commanders that have the same arena on their scope, they have the same goals, and things started to evolve. So, I think we got to a situation where the operational conditions were optimal and the corporation and strategic conditions, as to the relationships between Israel and the US and the understanding of each side's other plans and limitations and restrictions and capabilities, were far better. And this was enabled to flow up to the political echelon, better understanding what is possible, what isn't possible. And, you know, for – my – when I was the planner for this, my dream was that we do this together and not that the US does it for Israel, but that Israel does most of the job and the US will maybe do things that are using capabilities Israel doesn't yet have.

And that is what happened. And that's why I think that that's a long answer to your question, but I think that's the combination that brought this operation to be so successful in my opinion.



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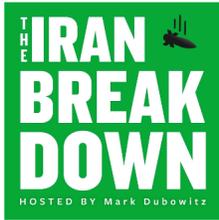
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DUBOWITZ: So, Tal, it's interesting to me because – so, I also began working on Iran 22 years ago and in a very different, obviously, capacity on the outside without necessarily intimate knowledge that you and others have of the operational planning. But I did sit through multiple think tank events, including discussions with U.S. military planners at the time. And every time we had these discussions from the U.S. perspective, there was always this sense that this was going to be an incredibly difficult mission. We were going to lose dozens of U.S. aircraft and pilots would be down and, you know, the retaliatory capabilities of the Iranians were quite severe, not only through their proxies as you described, but their ability to close down on Straits of Hormuz, their willingness to attack U.S. allies like Saudi Arabia and Bahrain and the UAE. In other words, every one of those discussions was dark and you walked out of the room thinking this just couldn't be done, this couldn't be done.

But it turned out not only could it be done, but it got done in really a spectacular fashion to the extent that – I mean, I remember that one moment, I don't know if it was day two or three during the 12-Day War when Trump said, "We own the skies. We own the skies." And clearly at the time, we didn't own the skies, Israel owned the skies, but Israel, as you said, had created the conditions that for the United States now to order the B2s to come in – and by the way, those pilots had been training for years for exactly this mission – and come in and drop the massive ordinance penetrators, particularly on Fordow, and do what potentially Israel could have done, but would have been much more challenging for Israel to do. It ended up being relatively easy for the United States and Iran's retaliatory options and retaliatory capabilities were quite limited as a result. So, let's switch to the, sort of, the Iranian side of this. Why? I mean, were the Iranians just so shocked by what happened after October 7th that they were sent reeling with their proxies being weakened, in some cases neutralized? Did we overestimate Iranian capabilities during all our planning? Was there a complete breakdown in command and control because of the surprise nature of the attack? What happened on the Iranian side of the equation?

KELMAN: Yeah. Well, I'll get to the Iranian side by addressing the first part of your question, which is, you know, I have very professional respect for my colleagues in the American military and really, we have – we had very intimate, still have very intimate – relationships and very intimate discussions. And I think if there was one thing that we were divided on was the scenarios that could develop from operations in Iran. And basically, what we as Israelis said is, "If Israel fights Iran directly, there will be a war, Iran will retaliate to Israel, will shoot missiles to Israel, will shoot cruise missiles, UAVs, drones, and long-range ballistic missiles." That's obvious. But the Iranian deterrence from going to full-scale war with the United States is sky-high, is a huge risk for the survivability of the Iranian regime, and therefore, our conclusion is that if the US does an operation and declares that it is ready or prepared to use its force and go for full scale war with Iran, Iran will have no other choice but not to retaliate and not go to a full scale regional war, especially not against the United States of America.

And there was a division. And I mean, I think we saw some examples. We saw that after the killing of Qasem Soleimani, the Iranian retaliation was very limited, much more limited than the assumptions were before. So, I think that's an area that we were divided upon. And we saw also in this war that also after the American joining and doing the specific operation that they did, the Iranian retaliation was very, very, very, very limited to American facilities in the region, declaring it ahead so that the results would be limited. So, I think it is nothing to do specifically with the 12-Day War. I think that whenever the US is all in and projecting power and prepared and that the Iranian believe that the United States is willing to use its force and go to full-scale war, that has huge deterrence on Iran.



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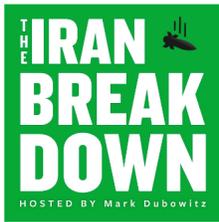
DUBOWITZ: Let me ask you, because it's a great point and it was always a subject of much debate, but why was there a division between the Israeli perception and the American perception about that? I mean, if you look at the history of U.S.-Iranian military confrontations since the Tanker Wars in the '80s under the Reagan administration to the accidental downing of an Iranian passenger jet that really actually convinced Ayatollah Khomeini at the time to end the Iran-Iraq War because he thought the United States was intervening on behalf of Iraq to all of these other examples, including, as you say, the killing of Soleimani; I mean, the history shows that the regime prioritizes its survival over all else, including its nuclear program, and that the one country in the world that threatens the regime survival more than any other is the United States. They don't want to confront the U.S. military.

So why was this continued and persistent perception that any kind of confrontation would ultimately escalate into World War III, whereas the Israelis understood, no, no, you need to escalate to de-escalate.

KELMAN: Yeah. Well, I think, you know, I don't have, you know, an exact answer. I'm not sure that I can explain, but I do think it's got to do with the history of wars, the United States wars in the Middle East, which were planned or estimated to be something and developed to be something else, which kind of created the conception that, you know, you're taking a risk and you never know where to develop. And I can understand that. I mean, it is true. You are taking a risk. Also, Israel, when we said our assumptions, it's risk taking, but Israel's experience in the region of using force all the time during the last years and seeing the Iranian behavior towards Israel, the parties gave us a lot of confidence. So, I think the difference was that Israel kind of had daily friction with Iran and its proxies in the region and kind of learnt the way the Iranians think.

And I think there was a bit more length or distance between the American military and the constant use of force. So, I think maybe that's one of the reasons, but I mean, at the end of the day, I'm happy that that difference did not bring it to the fact that we cannot do this together. And so that's, I think, on that point. Now, the other thing that I want to say about – okay – but then – the 12-Day War started and Iran was – at that point felt that it had lost two of its very important proxies, which is the Assad regime and all the Syrian air defense and Hezbollah. So, I think that brought the Iranian confidence of retaliating to a situation where they had – you know, were much less confident in going to full-scale war and they understood that they couldn't go to full-scale war and challenge Israel, do something from Iran and then have Israel deal with Hezbollah or deal with the militias from Syria because they weren't there.

That's the second thing. And I think the third thing was the opening. The opening move of the 12-Day War was actually taking most of the Iranian chain of command and eliminating it. And in any military organization, in any hierarchy, when you take the chain of command, it takes time. First of all, it affects performance, and it takes time to overcome that. And it's not as if you put someone new in the position two days or 12 hours after, immediately everything is working as it worked before. So, I think basically the opening night is something that kind of took the Iranian system off – out of balance and basically, I don't think it came back to full balance during the whole 12-Day War. So that affected, I think, the aggression, the retaliation, the decision making, the confidence of the Iranian leader about decision making, and that had a huge, I think, effect on the outcome.



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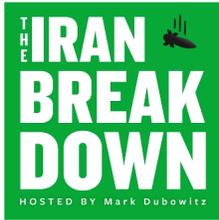
DUBOWITZ: I mean, Tal, that opening night was insane. I mean, it was remarkable. I mean, the level, first of all, of integration between the Air Force and Israeli military intelligence, Aman, remarkable integration. I'm sure that doesn't happen by accident. That's years and years of training and cooperation. And second, the level of Israeli intelligence dominance. I mean, to literally identify senior IRGC [Islamic Revolutionary Guard Corps] commanders in their bedrooms, in that apartment, on that side of the room, and eliminate the senior leadership, or at least a good part of the senior leadership, in a matter of a couple hours is remarkable intelligence dominance of an enemy that is thousands of kilometers away. I'm not going to ask you to get into the details of how Israel achieved that intelligence dominance, because clearly that's not something you want to talk about or should talk about. But where I do want to shift to is as a planner who planned these operations over many years as a strategist, as a policymaker, and as a fighter pilot, the next move for Iran – I mean, put yourself in the mind of an IRGC military planner now, where would you go in order to counter the Israeli and American threat in terms of reconstituting your capabilities, leveraging whatever proxies you have remaining?

And there I'm thinking of the Iraqi-Shiite militias that you referenced, the Houthis who really worry me – I think the Houthis are really the next Hezbollah in the future, if not already – and their relationships with China, with Russia, their ability to strike again, U.S. allies. I mean, what do you see from an Iranian strategic planning perspective as we look forward into 2026 and what worries you the most?

KELMAN: Well, first of all, I think that the Iranians are, like, after the war, we brought them to a junction, and they need to decide where they're going. I do think that, you know, for many years, the Iranian doctrine was create friction and fight Israel without fighting directly from Iran. In April 2024, the Iranian regime decided otherwise and struck Israel directly, and that led to a dynamic, about a year of process that brought to a full-scale war. So, I think one of the questions that the Iranians need to ask themselves is, first of all, what was that decision a correct decision from their point of view? And I think at the end of the day, they will probably go back to the same kind of strategy, which means they did not give up the proxy concept.

Although Hezbollah is very weak at this point, and although the Assad regime has fallen, and although Hamas is very, very weak, they will continue building, financing proxies in the region in order to try and, first of all, export the revolution and to challenge Israel and the US and their assets in the region. I think that hasn't changed. I do think that they understand that the closer the proxy is to Israel, the more vulnerable it is. So that might be an issue to consider. And obviously, I think the most important junction that they're at is what's going to be the future of the nuclear program? Because it's pretty obvious that the nuclear program was hit very, very hard. Iran was a threshold nuclear state before the war, and we have – what we've done in this war is threshold is now bigger. We've pushed them away in time. So, the issue is now is the decision making because there is nothing that can be – you know, you can destroy anything physically, but there's a lot of knowledge, a lot of experience.

So, the question is now, what will be the decision making in the Iran? They have three options. One is, you know, say, "Okay, we paid a huge price for trying to go nuclear. Let's go another way." They can take a decision to say, "Okay, we were attacked because we're not nuclear. We need to go very quickly to be nuclear." And they can decide to go back to the same strategy, which is try and be a threshold, go back to being a threshold, make the threshold smaller, shorten the threshold, and try and not pay the prices of going full nuclear. Those are the three options.



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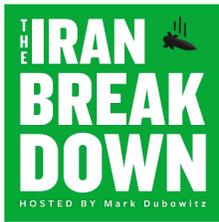
My assumption is that they will probably go to the latter, which is not take all the risk of dashing to nuclear capability, but go again to be a threshold. Now, the results of the 12-Day War were, again, when you look at it from the operational side, were very, very impressive, and the nuclear program was hit very, very hard, and it was pushed back. What was missing, in my point of view, is the day after the war. What is – how do you translate the amazing operational results into something that is more substantial? Now, here there are two options. One is, you know, stand aside and wait for the Iran decision making and hope that they will take the right decision, but at the same time, get ready for the next war, because if they don't make the right decision making, inevitably there'll be another war. And the second option is try and translate it to some diplomatic agreement, which will push Iran away from the option of being a threshold country or a nuclear country.

There is no diplomatic process at this point. And I think Iran at the end of the 12-Day War was at the lowest and weakest point it's been since 1979. And I think that was the exact time to, at least, try. I'm not sure it could succeed. And there are many people that are skeptical that you can bring Iran to any diplomatic [agreement], but I think that the effort should have been try and bring it around to the table. And if you'd bring it to the table, you need to put also carrots. It's not only sticks. But I think there were conditions that could have brought a potential agreement which is much better than the JCPOA [Joint Comprehensive Plan of Action], which I think was a bad agreement, has many flaws, had many flaws. There is no – after the snapback, the European snapback, there is no JCPOA. But I think there were conditions to try and discuss and maybe negotiate a much better agreement.

And I think the reason that's – that the potential was there because Iran was in such a weak spot, but also because they understood that the alternative is a credible military, Israeli-U.S. threat, which threatens the survivability of the regime. So, I think trying to leverage and put all that together and try to push that to some sort of agreement is something that was missing in the plans. So as a planner –

DUBOWITZ: I think overtures are being made and have been made. And the real question, and it's a question for FDD. Two decades, we've had a very clear position on what an acceptable nuclear deal should look like. And we view an acceptable deal as zero enrichment, zero reprocessing, and an agreement to fully dismantle Iran's nuclear program. And there was a time during the negotiations, even under the Trump administration, where we were concerned that the Trump administration had conceded enrichment to Iran. And the Iranians are being very clear there is no deal without enrichment. So that seems to be where the two sides are today and who's going to be willing to be flexible on that. We'll see. I mean, I think there will be a diplomatic process. I think Iran understands that the only place they ever win is at the negotiating table. So that's where they should be because they tend to run circles around U.S. negotiators and European negotiators.

So, I think they're coming back to the table. I just think the question is, are we willing to compromise on full dismantlement, zero enrichment? My position is no; we shouldn't. Clearly the Iranian position is no, they won't. And that may be the biggest barrier to a nuclear deal, but I think we're in full agreement. I mean, the only thing that is sustainable ultimately is some kind of political agreement that locks in U.S. and Israeli gains and pushes the program back even further.



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KELMAN: Yeah. Well, you know, first of all, Israel's position obviously is zero, zero, zero. And I hope there will be diplomatic negotiations, but it needs to be pretty obvious – and it is obvious and it's happening – Israel is getting ready for the next round, because if there is no agreement, I think it's inevitable when you look forward that there will be another clash. I don't know exactly when, but there are things that Israel – Israel won't live with an existential threat as a nuclear program. So, and I think, again, due to the lessons on the 12-Day War, Israel and the US can now even better or even more – have more intimate cooperation on the military side to have a robust, credible military option that will sit on the side of the negotiation table and be part of the negotiation and then maybe push the negotiations towards a better deal. That's one thing. And the second thing that I do want to say is that I want to talk a bit about the ballistic missile program because Iran is pushing forward to very high number of ballistic missiles.

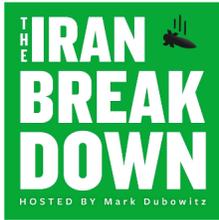
I mean, we were very, very, very successful in defending the ballistic – Iran's ballistic capabilities starting from drones, cruise missiles, and the ballistic long-range missiles, but Iran is going to numbers and to high numbers. And I think it needs to be obvious that Israel, which is a small country, very large number of ballistic missile capabilities – that are not like the ballistic missiles that we're talking from Lebanon or from Syria – that we saw some of their capabilities here in Israel, could be close to an existential threat to Israel. So that when and if there is a negotiation with Iran, also the ballistic missile program must be discussed because if not, that could be another tripwire that will bring a future clash. One of Israel's most important lessons learned from the past two years is that we must prevent severe threats being built by extreme actors or regimes in our area.

And I think it's not only the nuclear, it's also the Iranian ballistic missile program.

DUBOWITZ: No, Tal, 100 percent. And what I worry about the most is that the U.S. threat perception is nuclear only and that the predicate for legitimate action is Iran's expansion of its nuclear program, but that its ballistic missile program, which as you said rightly so, is very dangerous, maybe near existential. That is the threat to Israel, but less of a threat to the United States, or at least perceived to be less of a threat to the United States, and that the importance of building up the knowledge in Washington that Israel will have to move against the ballistic missile program. I mean, if you can comment, and if you can't, I understand, but I mean, I see evidence publicly reported of Iranian reconstitution, air defenses, ballistic missile production capability. Obviously the proxy I'm most concerned about is the Houthis, who are really building up extraordinary capability, Hezbollah-like capability in Yemen.

I'm deeply concerned about, God forbid, but an October 7th invasion of Israel's borders by the Houthis. It'd be interesting question about where that come from, you know, through Saudi, through Jordan, through Syria, but you could see them building up thousands of Houthi fighters on Israel's borders. Also threatening the Hashemites in Jordan and bringing down the kingdom there. If I were Khamenei, I'd be working real hard because that's obviously Israel's longest border and, until recently, has been undefended. So, all these reconstitution efforts seem to be underway, at least as publicly reported. The Chinese seem to be helping the Iranians, and the Russians seem to be less so because they're obviously distracted with Ukraine. And it seems to me Israel should be playing hardball even with the Chinese and saying, "To the extent that you help the Iranians reconstitute all these capabilities, we'll help the Taiwanese build up their capabilities." You want to comment on any or all of that?

(CROSSTALK)



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KELMAN: Well, first of all, I'm not exposed to intel nowadays as a civilian, but I see all the publishing that's happening. And yeah, it's pretty obvious that, as I said, Israel is getting ready for the next conflict. I'm sure the Iranian side is. And what is, I think, should be not only Israel's concern is the fact that Iran has very close relationship and even growing closer in the past few years with Russia and China. And Russia is, even though they're distracting the Ukraine, helping the Iranians with some things. China more so. So, it's an area where the global power competition is here and it's part of the global power competition. So definitely, I think it should be a concern.

That's one thing. The second thing I wanted to say about the ballistic missile capability, a country that has such sophisticated ballistic missiles and quantity and relationship with the Chinese and the Russians will in a few years have maybe hypersonic capabilities, which at the end of the day, will be a threat beyond the Middle East, and it will be – and it can be a threat to Europe and it can be a threat to the United States and it can be a threat – so, you need to try and deal with these things when they're smaller, because if you look at the potential, we're talking nowadays about the CRINK – the China, Russia, Iran, and North Korea – collaboration here. That's, I think, a global issue. It's not a regional issue. And Iran is connected to the other three partners in this CRINK axis, if you – so-called – it's not really an axis –

DUBOWITZ: Yeah.

KELMAN: but it's cooperation that's happening there.

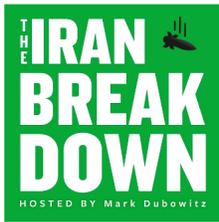
DUBOWITZ: Yeah, and we call it the Axis of Aggressors at FDD and our colleague, Brad Bowman, is finishing off a major report on the cooperation between these four adversaries. And, you know, he's identified literally hundreds and hundreds lines of effort, bilateral, trilateral, and quadrilateral between these adversaries, and they are hard to work. And I think, Tal, you're right, I mean, Iran has had an active program to develop intercontinental ballistic missiles for a number of years in cooperation with other members of this axis. And yeah, I mean, those are missiles that are not for Tel Aviv. Those are missiles for the American homeland.

KELMAN: Yeah. So –

DUBOWITZ: To your point.

KELMAN: So, I think this point – raising the awareness of this point, I didn't know FDD was working on it, but I think it's very, very important. And yes, to your question, I think the question is now back to Israel. I think we need to look at our policy towards China because, you know, China doesn't work in direct friction, but is doing very negative activities in the Middle East and vis-a-vis the region, and Israel cannot sit aside and state the same policy that you have been, I think, in past years due to this dynamic and this cooperation, but that's an issue to Israeli policymakers.

DUBOWITZ: So, Tal, let me ask you, obviously coming out of the 12-Day War and two years of intense fighting, the Israeli government has committed to a significant increase in the defense budget, so there'll obviously be a lot more money spent on building up Israeli capabilities in the air, on the ground, in other domains. But one of the things that's really struck me is the incredible defense tech innovation that we've seen coming out of Israel and venture capital firms are raising money to invest in defense tech companies. There've been a number of really interesting companies that have been launched. Say a few words about Israeli defense tech, where it's going, how it can contribute to not only Israeli security, but to American and Western security as well.



The Empire Strikes Back?

December 22, 2025

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KELMAN: Yeah. Well, I think Mark, one of the – there are many lessons learned from the past few years, but I think inevitably it is pretty obvious when you look back and you look at the strategic situation that Israel faced in the Middle East and you look at the defense budget and the percentage of the defense budget from the GDP, there was a dis— I would say disharmony between the strategic situation and where we were. And I think that led to many of the things that we saw here, but I think that lesson has been learned, and I think the defense budget is raging – raising and it's happening worldwide with governments. But I think that in addition to what's happening on the government level, one of Israel's strongest assets is its high tech and its innovation and the startup nation. And what we're seeing in the past two years is that – that very strong strength of Israel is now kind of changing course or adjusting course and going into defense.

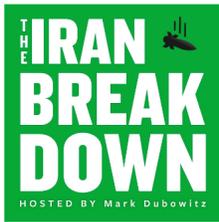
Startup companies for many years avoided defense because defense was for big primes and for governments and slow processes and complicated processes, but the need and the fact that technology is available and that our adversaries are changing very fast and that we need to change very fast is taking many of the Israeli startup companies into the area of defense. There are hundreds of companies that are now doing or dual use or have shifted into defense and that is a very strong tool for Israel's defense and Israel's strategy, but these startup companies obviously can sell abroad, can sell in the US, can sell to Israel's allies and partners. And I think that what we're seeing is investors that are willing to invest in defense because they're seeing what's happening globally and that that's an area that there's a potential also profit. It's also important from national security and values, but it's also an option, an economical option.

So, there's a lot of dynamic in that area. And obviously these Israeli companies are looking to sell to the IDF, and the Israeli defense tech is not theoretical. These are capabilities that were deployed into the battlefield during this war and very quickly adjusted due to using it in the battlefield. So many of these are battle proven capabilities and startup innovators that came out of the battlefield, understanding what the modern warfare looks like, what the gaps are. So, I think what we're going to see in the next few years is more and more Israeli startup companies getting bigger, maybe built into medium companies, even primes, new primes that are working in quicker processes and bringing innovation quickly to the battlefield and selling outside of Israel. I think number one obviously is the United States. And I think when we're looking at the future of the U.S.-Israel relationship, there are many layers of that.

One of that should be on the civilian side and on the technological side and enabling the civilian market, flow – make a quicker flow of technologies and companies between the two countries I think could be very important for both countries' national security.

DUBOWITZ: I'll just say one thing on that. What really struck me was – it was I think quite an emotional moment where Israel has sold its Arrow 3 air defense system used to counter, amongst other things, ballistic missiles to Germany in a major deal. I think it was the first time that Israel sold that air defense system abroad,

But this sort of idea that the Jewish state, 75 years after the Holocaust, is defending Germany from threats, including threats from Putin and Russia, is interesting symbolism, but I think it underscores exactly what you're talking about, which is incredible Israeli innovation from concept to battlefield testing, to deployment, to effectiveness is something that everybody is noticing, including European allies who may be moralizing about Israel on the political side, but on the defense side, understand that Israel is key to defending Europe against the threats from Russia, helping the Americans, threats from the Chinese Communist Party, as well as obviously our allies in the Indo-Pacific. And so once again, Israeli innovation, battlefield experience is defending democracies. So, it's really an interesting opportunity.



The Empire Strikes Back?

December 22, 2025

Featuring Tal Kelman

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KELMAN: So, this is something that I'm dealing with in other positions that I'm doing, except for being a senior fellow in the FDD. And yeah, we are seeing growing interest from the US, U.S. DOD, U.S. companies looking at Israeli companies, and also European, and also worldwide. So, I think we're seeing a bit of a difference between some of the things that are happening on the political level. When you go down to the professional defense level, we're seeing growing interest and reach out, and I think we're going to see some breakthroughs in that area in the next few years, and I think it's very important for Israel's overall national security.

DUBOWITZ: So, Tal, I want to move from air power and obviously Israeli capabilities on the ground and cyber and some of the extraordinary capabilities that Israel has demonstrated, to touch on a couple of things that you mentioned. I mean, it's a longstanding view of FDD and this podcast that the only way to solve this problem is to break down the regime in Iran and free the Iranian people who obviously have been on the streets since 2009, yelling death to the dictator. Who in my view, if they were living in a free Iran, there would be a strong relationship between Iran and Israel and Iran and America, the majority of Iranians despise this regime. So, it really just sort of opens up the opportunity to do something that I think the United States and Israel have not done in the past, which is really to focus on what does it take to weaken, undermine, and ultimately topple this regime.

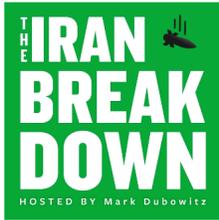
And that sort of opens the opportunity for a different kind of air war, but in this case, an influence war to really support the 80 percent roughly of Iranians that despise the regime, the 20 percent of Iranians that may support the regime, but may have different ideas, particularly in the Wake of the 12-Day War about where the Islamic Republic should be going and where the existing fractures and fissures are within the support base, and what can we do to intensify that? I mean, without getting into specifics of projects and programs and what Israel might be doing, as a former fighter pilot who's flown on the air, including in the recent war, what's your view of the importance of influence?

KELMAN: Yeah. Well, as you said, my operational experience is creating influence with taking bombs from point A to B as a fighter pilot, but I think times are changing and I think all the influence domain is getting – is gradually becoming a greater opportunity on operational and a greater threat. We're in a different era, and I think influence needs to be part of modern warfare. Western countries are less developed in this area. I think we see part of these countries that we've talked about are very, very strong on influence, are conducting influence operations against Western democracies, Israel, US, and others. And I think that needs to be part of our strategy. That's one thing. So, I totally – and I think it's a very strong tool, stronger than some of us perceive, and we need – I think Israel and the US need to move forward much faster in that area.

That's one thing. The second thing, I totally agree with you that if you look at the core issue, Israel does not have a problem with the Iranian people. We had relationships 'till 1979. We had Israelis working in Iran and –

DUBOWITZ: By the way, including on helping the Iranians with their water problems, those Israelis were expelled. Iranian water scientists and engineers ultimately were accused of being, you know, Israeli-American spies. They were expelled. And now lo and behold, the Islamic Republic is facing an absolutely severe, perhaps regime ending, water crisis, which is that the irony is sad, but notable.

KELMAN: Yeah. My father is a agronomist, and in 1977, when my parents decided to leave the kibbutz, he was offered two optional jobs. One was in Tehran doing agriculture and water planning, and one was in Israel. At the end of the day, he decided to stay in Israel, but that was two years before the Israelis were pushed out of Tehran and there was the revolution. So, I totally agree that the core issue that Israel has with Iran is the regime. On the other hand, I don't – when you look at the history, I don't really fully believe in the fact that you can put a goal to topple a regime and do it from the outside. Regimes are – collapse due to internal issues.



The Empire Strikes Back?

December 22, 2025

Featuring Tal Kelman

Hosted by Mark Dubowitz

None of us predicted – when we predicted the Assad regime is going to fall, it didn't. And when we didn't even think it was on the chart, it took three days or two days and the regime fell. What I do believe is the fact that we need to put this regime under pressure. We need to weaken it. We need to try and shift its focus from fighting wars in the Middle East and from fighting Israel 1,500 kilometers away from homeland to focus internally. So, I think weakening and improving the conditions for maybe in the future, regime change is the best we can wish for, but it's, at the end of the day, up to the Iranian people. And I do think we need to support the Iranian people. I do think we need to challenge the regime. And I think that the Israeli-Iranian conflict will end when there is a different regime in Iran, more pragmatic, thinking more about the Iranian people than it's thinking about the Israeli people.

DUBOWITZ: Yeah, no, it's interesting to me because if you've – and I know you have, but if you spend time in Taiwan, the Taiwanese are very aware of how the Chinese are using what they call cognitive warfare in order to weaken and undermine Taiwan and to break Taiwan's will to fight, to break the U.S.-Taiwan relationship so that we won't defend Taiwan because I think Xi Jinping believes that ultimately, while he may prepare for war, and he certainly is, he thinks he can actually take Taiwan without firing a shot through the use of cognitive warfare, and that our adversaries, the Europeans call it CRINK, we call it the Axis of Aggressors, but the Chinese, the Russians, the Iranians, and to some extent, the North Koreans are using cognitive warfare to deepen and expand the fractures and fissures within Western democracies very successfully. And look at the past few years,

Look at our democracies. Look at your democracy, look at our democracy, look democracies around the world have been targets of cognitive warfare campaigns by our adversaries, and they've been very successful. And yet we don't seem to want to, A, defend against it and B, even engaged in offensive cognitive warfare. And I think we're surrendering a key battleground to our adversaries. And I hope your establishment, my establishment, gets much, much more serious about cognitive warfare because I think Xi Jinping has rightly said, if you use your capabilities in influence, you may have to use less capabilities on the military side. So, prepare for war, but try to undermine your adversaries without necessarily having to resort to war.

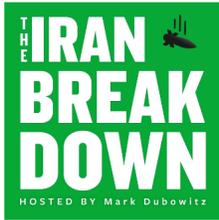
KELMAN: Yeah. I don't think you will – I mean, I think the issue is the combination between cognitive warfare, soft power, and hard power. I don't think we're in an era where you can put hard power aside and say, "I'm only going to that area," but I totally think there needs a combination and balance and balance up the soft power and the information operations. It's happening, but it's a very slow process, I think, in Western establishments. And I hope now that some of the lessons it learned after the past two years in the Middle East will push Israel forward faster in that area.

DUBOWITZ: So, Tal, listen, thank you. First of all, honored to be your colleague. Thank you for your service, not only to your country, but to the U.S.-Israel relationship. It always strikes me when I'm in Israel to be able to interact with people like you. And need I say, because you and I are the same age, people who are younger than us, young Israelis, young Israeli pilots, soldiers, people in the tech sector, people are just living their lives here. I noted the other day that Israel, I think, was ranked in the top 10 happiest countries on earth in 2025 in the middle of a war and I think in the top five were people under the age of 30. So, it's always remarkable to come here and feel that spirit. And yeah, thank you for your service.

KELMAN: Thank you very much, Mark. And I just want to take the opportunity to say that I think what you're doing for the U.S.-Israel relationship and for fighting for – I appreciate it. And I'm very happy to be a colleague in FDD now.

DUBOWITZ: And I am very confident that one day we will be doing a podcast from a free and democratic Iran, and I look forward to that day.

KELMAN: Okay. Let's set a date for that.



The Empire Strikes Back?

December 22, 2025

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DUBOWITZ: Got it. Thanks, Tal.

My thanks to Major General (Retired) Tal Kelman, my colleague here at FDD for giving us a rare glimpse into Israel's fight with the Islamic Republic from both the cockpit of an F-35 and the command rooms where Iran's strategy is built. What we heard today is sobering. Israel's air campaign struck hard and achieved real gains, but it also ushered in a new period of uncertainty. The regime is damaged, humiliated, and under pressure that makes them more fragile, but also more dangerous. The coming months will be shaped not just by what Israel did, but by how the Islamic Republic chooses to respond. We may be in a rare window of advantage or on the cusp of the most dangerous phase of this conflict. Tehran's next move, whether restraint or escalation may be the most consequential yet. The stakes certainly cannot be higher. I'm Mark Dubowitz, and this has been The Iran Breakdown.

Until next time.