

MONTHLY REPORT

Iran Case File

February 2025

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ISSN 1658-8320



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ISSN 1658 - 8320

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Contents

EXECUTIVE SUMMARY	4
DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS	8
"Conservative" Pressure on Pezeshkian's Government Leads to Hemmati's Dismissal and Zarif's Resignation	9
First: Implications and Repercussions of the Vote of No Confidence Against the Minister of Economy	9
Second: "Hardliner" Pressure Forces Zarif to Resign	10
Conclusion	11
Iran Concludes Two-Month Drills to Test Air Defenses	11
First: The Nature of the Maneuvers	11
Second: Efforts to Overcome Limited Capabilities	12
Conclusion	13
Sophisticated Strategies and Solutions to Curb Declining Marriage Rates in Iran	13
First: The Effectiveness of Dating Apps and the Challenges Posed to Iranian Society	14
Second: Amendments to the Applicable Marriage Laws	15
Conclusion	15
Divisions Within the Taliban and Regional Competition	15
First: Deepening Divisions	15
Second: Causes of Contention	16
Third: The Role of International Actors and the Future of the Crisis Within the Taliban	16
Conclusion	18
IRAN-ARAB INTERACTIONS	20
Iran's Internal and External Calculations in the Iraqi Arena	21
First: Internal Moves to Change the Iraqi Equation	21
Second: External Moves to Pressure the Iraqi Government	22
Third: Iranian Engineering to Preserve Gains in Iraq	22
Conclusion	22
Lavrov Visits Tehran as Concerns Mount Over a Russo-US Rapprochement That Could Impact Iran's Interests in Syria	23
First: Contexts of Lavrov's Visit to Tehran	23
Second: Iranian Perceptions Regarding the Timing of the Russian Visit	23
Conclusion	24
IRAN'S RELATIONS WITH INTERNATIONAL POWERS	26
Iranian Reactions to Trump's Coercive Diplomacy	27
First: US Pressure for a New Agreement	27
Second: Iran's Rejection of Pressure and Limited Maneuverability	28
Conclusion	29

IAEA Reports Reveal Iran's Nuclear Violations.....	29
First: Alarming Warnings	30
Second: The European Position on Developments	31
Conclusion	31
The Impact of Russo-US Understandings on Iran	31
First: Backdrop and Iranian Reactions	32
Second: Impact of the Talks on Relations.....	32
Conclusion	33

EXECUTIVE SUMMARY

In February 2025, Iran witnessed a series of rapid developments and events at various political, military, social and ideological levels. These also impacted Iran's relations with the Arab and international community, which were fraught with complex interactions that are expected to have repercussions on Iran's overall foreign relations in the coming period.

Domestically and politically, the pressures the Iranian government has faced, particularly over the past two months, resulted in the parliamentary questioning of Economy Minister Abdolnasser Hemmati, followed by a vote of no confidence against him on grounds of continued economic deterioration, worsening inflation and high prices and failure to stem the collapse of the national currency. Hours after Hemmati's dismissal, Vice President for Strategic Affairs Mohammad Javad Zarif submitted his resignation. The common denominator between Hemmati and Zarif, which strained their relations with the "hardliners," was their call for negotiations with the West and their assertion that Iran's crises cannot be resolved without a more balanced foreign policy and improved relations with major Western powers, including the United States. It appears that the dismissal of Hemmati and the resignation of Zarif were orchestrated by the "hardliners" to hold the Pezeshkian government responsible for the economic deterioration and evade any domestic repercussions Iran may experience as a result of its refusal to negotiate with the Trump administration.

On the military front, Iran recently intensified its military maneuvers, coinciding with Trump's return to power and his resumption of policies against Iran, including the strategy of "maximum pressure" and threats of a military attack to force it to sign a new nuclear agreement that would address the shortcomings of the previous agreement from which he withdrew. In response, Iran is using these maneuvers to send messages emphasizing its military capabilities. Within this framework, the Eqtedar 1403 maneuvers, which began in December 2024 and con-

cluded in February 2025, involved all sectors of the Iranian armed forces and the various weapons systems they possess. While these maneuvers may have reassured Iran internally about its military capabilities, externally, Iran's defenses remain weak based on previous Israeli attacks, which demonstrated their inability to repel a comprehensive assault. Iran's ballistic missile arsenal remains virtually the only area where the country could achieve success through large-scale attacks.

Socially, reluctance to marry has become a widespread phenomenon in Iran, as in many countries, due to factors related to globalization and associated changes in lifestyles. However, the Iranian situation is distinct in that the country has been subject to economic sanctions for decades, resulting in extremely difficult living conditions that have contributed to the decline in marriage rates and the proliferation of alternative forms of social engagement such as online dating sites. As part of the state's efforts to address this social challenge, the Pezeshkian government is working on various solutions, such as granting loans to young people wishing to marry to cover costs. Additionally, it is shifting from a legal approach focused on banning dating sites — previously seen as a cause of the phenomenon's spread — to working on legalizing and regulating these as a means of facilitating social engagement with an aim to promote marriage. However, these efforts face multiple challenges, including economic difficulties, social constraints and political obstacles due to ideological divisions between the “conservatives” and “reformists” regarding “technological openness” and “cultural invasion.”

Ideologically, the Taliban movement in Afghanistan appears to be maintaining coherence in terms of its ideas and institutions for now. It is managing its foreign policy efficiently, engaging in dialogue with India, Russia and China, and effec-

tively handling its disputes with Iran over water, borders and religion. At the same time, internal disagreements among Taliban leaders have surfaced. These could have been denied or ignored, but they became evident after Haqqani publicly criticized certain policies and Deputy Foreign Minister Sher Abbas Stanekzai fled after openly condemning restrictions on women's education, accusing the movement's leader of being behind these decisions. These developments raise questions about the Taliban's future and its ability to manage internal disagreements while simultaneously navigating foreign relations, balancing regional and international influences and upholding its ideological and religious legitimacy among its supporters.

Iran's foreign relations with the Arab world and the broader international community saw significant developments in February 2025. Neighboring Iraq is witnessing rapid transformations due to a historic opportunity for change created by Iran's regional losses and intense US pressure on the Iraqi government to curb Iranian influence. Some Sunni alliances are now seeking to unite and seize this opportunity, particularly in light of preparations for the 2025 parliamentary elections. On the external front, after the Turkish foreign minister's visit to Baghdad, Ankara sought to play an active role in Iraq to strengthen relations and draw Iraq into its sphere of influence. Conversely, Iran has been working to maintain its influence in Iraq, emphasizing that the Popular Mobilization Forces (PMF), the Iran-backed umbrella militia organization, remains a red line, akin to a parallel army similar to Iran's Islamic Revolutionary Guard Corps (IRGC). The leaders of the Iran-backed Coordination Framework expressed their categorical rejection of any interference with the PMF. They also submitted a draft law to Parliament proposing amendments to the PMF law, including raising the retire-

ment age and implementing a mechanism to replace dismissed or retired personnel to prevent a decline in the PMF's numbers, which could eventually weaken its forces.

Regarding Iran-Syria relations, Iran faces a new strategic challenge amid accelerating geopolitical changes. Following the fall of the Bashar al-Assad regime — one of Iran's key regional allies — Tehran fears losing Russia as an ally due to Moscow's increasing rapprochement with the new US administration. Despite Russian Foreign Minister Sergey Lavrov's visit and efforts to assuage Iranian concerns, these fears persist, particularly regarding the possibility that Russia-US rapprochement could reshape the regional landscape in ways that do not serve Iranian interests, especially in Syria.

In its interactions with international powers, Iran's relations with Washington saw a significant escalation in February 2025 due to Trump's enforcement of the "maximum pressure" policy and Iran's refusal to negotiate under duress. This escalation could potentially lead to a confrontation between the two sides. Regarding relations with European countries, the International Atomic Energy Agency (IAEA) issued two confidential reports

detailing Iran's repeated and ongoing violations of the Joint Comprehensive Plan of Action (JCPOA), signed with the P5+1 in 2015, as well as breaches of the Nuclear Non-Proliferation Treaty (NPT). The reports highlighted Iran's continued increase in uranium enrichment and stockpiling, which could be used for nuclear weapons. The European Union shared the IAEA's concerns over the prolonged absence of nuclear inspectors from Iranian facilities and urged Tehran to return to its commitments and resume full implementation of monitoring and verification measures under the JCPOA.

Concerning Russia-Iran relations, talks held between the new US administration and Moscow in February 2025 sparked serious concerns in Iranian circles. Iran fears that a Russia-US rapprochement, particularly if it results in the lifting of US sanctions on Russia, could diminish Russia's reliance on Iran as an economic and military partner. This could significantly impact Tehran's economic and military prospects, particularly in the energy, transportation and military industries, which Iran had hoped to strengthen through the partnership agreement signed with Russia in January 2025.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

In February 2025, Iran witnessed numerous developments at the political, military, social and ideological levels. The most prominent of these developments can be identified by examining the following issues:

- “Conservative” Pressure on Pezeshkian’s Government Leads to Hemmati’s Dismissal and Zarif’s Resignation.
- Iran Concludes Two-Month Drills to Test Air Defenses.
- Sophisticated Strategies and Solutions to Curb Declining Marriage Rates in Iran.
- Divisions Within the Taliban and Regional Competition.

“Conservative” Pressure on Pezeshkian’s Government Leads to Hemmati’s Dismissal and Zarif’s Resignation

In the first crisis facing President Masoud Pezeshkian, the “conservative”-controlled Iranian Parliament voted to remove the Minister of Economy and Finance Abdolnaser Hemmati, citing the inflation crisis and the decline in the value of the Iranian currency. Hours after Hemmati’s dismissal, Mohammad Javad Zarif, the Iranian president’s strategic affairs advisor, announced his resignation on the recommendation of the chief justice. What are the implications and repercussions of the vote of no confidence against the Iranian minister of economy? What pressure did the “hardliners” exert on Zarif to resign?

First: Implications and Repercussions of the Vote of No Confidence Against the Minister of Economy

Iran is facing a severe economic crisis due to longstanding US sanctions, a sharp decline in oil revenues after exports fell to their lowest levels, and, more recently, the Trump administration’s return to a policy of “maximum pressure” against Iran. All of these factors have led to rising inflation rates, high prices, a decline in the value of the local currency and a large budget deficit. However, the “hardliners” and members of the Iranian Parliament have consistently criticized the government’s economic policies, holding the minister of economy responsible for the economic deterioration, high prices and the devaluation of the national currency. This pressure, which has been mounting since last January, resulted in the questioning of Hemmati and his subsequent dismissal from his position on the grounds that his justifications were not convincing to Parliament. The vote, in which 273 members participated, resulted in 182 in favor of withdrawing confidence from the minister, 89 against, one

abstention and one invalid vote. Thus, the minister of economy is the first minister in the national consensus government formed by Pezeshkian, which comprises “reformists,” “moderates,” and “conservatives,” to be questioned and subsequently dismissed. He is also the first minister to appear before the “conservative”-majority Parliament.⁽¹⁾

Government officials defended Hemmati’s performance, asserting that the devaluation of the national currency and the rise of the dollar have nothing to do with the ministry. They argue that the economic developments taking place in Iran are beyond the control of the government, Parliament and the Ministry of Economy and are not related to the Pezeshkian government. This suggests that the main issue facing the Iranian economy is the sanctions and the refusal to negotiate a solution to the nuclear program crisis. As long as this crisis remains unresolved, all economic policies will be futile, and any minister who succeeds Hemmati will face the same obstacles. President Masoud Pezeshkian also defended Hemmati and his government’s economic performance, asserting that Hemmati’s departure will not resolve the currency devaluation crisis. Pezeshkian indirectly blamed Khamenei for Iran’s economic deterioration, stating that he had initially agreed to hold talks with the United States but ultimately, the Iranian president acquiesced to the supreme leader’s new public position of opposing negotiations.⁽²⁾ This statement reveals the significant divergence in approach between Pezeshkian and Khamenei for addressing the crises facing Iran. This was also the first time that Pezeshkian broke his silence to speak about the pressure his government faces from the supreme leader. In addition to Pezeshkian, the “reformists” argue that those who should be held accountable and removed from their positions are those who refuse to negotiate with the United States over

the nuclear program, thereby prolonging the sanctions, rather than the minister of economy, who had made every effort to improve the economic situation despite the halt in oil exports and the ongoing sanctions that have shattered the Iranian economy.

Despite Hemmati's failure to improve the country's economic situation, Iran's deteriorating economy was not solely the result of his mismanagement. Therefore, his dismissal may be nothing more than an attempt to scapegoat him, Pezeshkian's government and the "reformists" for policies that have led to continued economic deterioration. This allows the "hardliners" to distance themselves from responsibility, especially in light of the repercussions Iran may face due to the supreme leader's and the "hardliners" refusal to sit at the negotiating table with the US administration to end the nuclear crisis. The leadership fears that public frustration stemming from its initial willingness to negotiate with the Trump administration, followed by its subsequent refusal, could lead to renewed protests. The continued economic decline also provided an opportunity for the "hardliners" within the Iranian establishment to get rid of Hemmati, who had repeatedly stated that the key to solving Iran's economic problems and offsetting the budget deficit lies in foreign investment. He argued that this goal cannot be achieved without a softening of foreign policy and improved relations with major Western powers, including the United States.⁽³⁾ This position starkly contrasts with the view of the "conservative"-dominated Parliament, which holds that Iran should not rely on foreign investment, negotiations or relations with the United States to solve its economic problems. Hemmati's opponents believe that his decisions, which led to the rise in the price of the dollar and gold, were intended to force the establishment to negotiate with the United States. Therefore, keeping such a

person at the helm of the country's economy was deemed against the interests of the Iranian republic.⁽⁴⁾

Hemmati's dismissal will have several repercussions for the Pezeshkian government. Among these is the fact that his removal came only seven months after assuming his post — a period too short for a fair assessment of his performance. Furthermore, the dismissal is ill-timed, as it coincided with the approval of next year's budget, for which the minister of economy is responsible. Under such circumstances, his interim deputy may not be able to handle this responsibility effectively.⁽⁵⁾

Second: "Hardliner" Pressure Forces Zarif to Resign

Mohammad Javad Zarif, who served as foreign minister in Hassan Rouhani's government, played an influential role in Pezeshkian's election campaign. He worked to foster consensus among "moderate" and "reformist" forces in Pezeshkian's favor, advocating for constructive engagement with the world and portraying Pezeshkian as the best candidate to end Iran's isolation. After Pezeshkian's victory, the new president tasked him with overseeing an advisory committee responsible for selecting ministers. He was then appointed vice president for strategic affairs, a newly created position and was expected to play a decisive role in shaping government policy. However, Zarif faced intense opposition from the outset, with critics arguing that his appointment was illegal due to his children's dual citizenship.

In January 2025, Zarif faced a storm of criticism following his statements at the Davos conference, particularly when he mentioned the government's postponement of hijab regulations to avoid putting pressure on women. The "hardliners" organized protests in front of the presidential building, denouncing his statements and demanding his removal, even calling

for his trial on charges of “corruption on earth” — an offense that could carry the death penalty.

The internal and external pressures on Zarif ultimately prompted his resignation. He announced his resignation just hours after Hemmati’s dismissal. In a post on X, Zarif explained that he had accepted the recommendation of Chief Justice Gholam Hossein Mohseni-Eje’i to return to academia “to avoid further pressure on the government.” He further stated that over the past six months, he and his family had been subjected to “the most absurd insults, slander, and threats,” and that even within the government, he had endured the most challenging period of his 40-year career.⁽⁶⁾

Since his election campaign, Pezeshkian has declared his desire to improve Iran’s relations with Western countries and resolve the nuclear crisis through negotiations, a policy rejected by the “hard-liners” who believed that Zarif intended to implement Pezeshkian’s stated policies. Zarif is the architect of the 2015 nuclear agreement with the major powers, and, compared to many Iranian officials, he is more familiar with the domestic and political conditions and developments in the United States.

Therefore, he could promote and achieve the government’s objectives. Zarif’s remarks at the Davos conference, his violation of the October 2022 dual national citizenship law and Trump’s return to the “maximum pressure” policy, provided an opportunity for supporters of Saeed Jalili, the defeated candidate in the recent presidential election, and other “conservatives” who oppose any kind of negotiation or agreement on Iran’s nuclear program, to sideline one of the most prominent figures in Pezeshkian’s government.

Conclusion

The dismissal of Hemmati and the resignation of Zarif after only seven months in

office highlight the strength of the government’s opponents within the ruling establishment. Even if Pezeshkian’s government seeks to resolve Iran’s crises, it will likely face significant and daunting obstacles. Although the removal of Hemmati and Zarif may reduce immediate pressure on the government, it does not guarantee Pezeshkian’s ability to retain his remaining ministers, many of whom the “conservatives” have already sought to question. Furthermore, the overwhelming parliamentary vote to withdraw confidence from Hemmati, coupled with Zarif’s forced resignation, suggests that their removal was premeditated — perhaps with the direct approval of Supreme Leader Ali Khamenei.

Iran Concludes Two-Month Drills to Test Air Defenses

Over the past two months, Iran has worked hard to project a tough stance through statements from its leaders and joint exercises across the country. Following two Israeli strikes, Iran’s Islamic Revolutionary Guard Corps (IRGC) conducted war games that showcased its active arsenal and tactics while also revealing its vulnerabilities in the event of another attack. This file discusses the progress of the Eqtedar 1403 drills, which began in December 2024 and concluded in February 2025, as well as the units that participated in these exercises.

First: The Nature of the Maneuvers

The Iranian maneuvers, codenamed Eqtedar 1403 (part of the Great Prophet 19 maneuvers), began on December 28 with the aim of testing various offensive and defensive weapons systems and tactics. The exercises demonstrated the armed forces’ preparedness against potential attacks. The unprecedentedly long drills included all sectors of Iran’s various military branches and the weapons systems in its arsenal. These maneuvers provided a rare opportunity for Iran’s adversar-

ies to assess its tactics and force coordination rather than launching an attack whenever the opportunity arose.

The Air Defense Force's maneuvers, under the Eqtedar Brigade, continued from January 7 to January 12. The IRGC Air Force conducted an air defense simulation near the Natanz nuclear facility in central Iran, while the Air Defense Force conducted similar simulations near the Fordow and Arak nuclear facilities.⁽⁷⁾ In the second phase, from February 26 to February 27, the Air Defense Force carried out intensive simulation activities around the Shahid Ahmadi Roshan nuclear site, also known as the Natanz site, against various air threats under critical electronic warfare conditions.

The Iranian army also practiced using the Bavar-373 air defense system alongside the Russian S-300 system against "invading" fighter jets.⁽⁸⁾ The recent Israeli attack appears to have disabled the remaining S-300 systems, making it likely that the Russian systems were deployed alongside Bavar radars or launchers. Meanwhile, the Iranian Ground Forces began the first phase of their training from January 4 to January 9, with the inaugural drill in Kermanshah Province, which included rapid response operations and swift troop and equipment transfers. The second phase, from February 18 to February 19, involved ground forces in southwestern Iran, near the Azerbaijani border, deploying artillery systems, armored units, drone operations, missile strikes and aerospace forces with a revolutionary spirit. Then, from February 22 to February 25, the Iranian Artesh and IRGC conducted training in southeastern Iran. The naval exercises, dubbed Eqtedar, took place from January 24 to January 29, 2025, and involved IRGC forces in the coastal areas of Bushehr and Khuzestan.

A closer look at publicly released videos confirmed the involvement of the Tapas medium-range air defense system, the Som-e Khordad long-range air

defense system (or the Third of Khordad, named after the third month in the Iranian calendar), the Devol short-range air defense system and the Safir-14 passive electro-optical system for the Ra'ad air defense system.⁽⁹⁾

The final phase of the exercises included training for IRGC naval commandos involved in operational combat in coastal areas and at sea. In addition to air defense, coastal protection operations were deployed using a variety of weapons, including artillery rockets, guided missiles, airborne forces, surface-to-surface cruise missiles, suicide drones and jamming and reconnaissance assets to simulate real-world scenarios.

In this context, an interesting claim has been made that the Iranian military has developed AI-powered missiles and drones that have proven successful in training exercises.⁽¹⁰⁾ Ground forces have also trained with T-72F Karrar tanks, not only for land combat but also for crossing waters using ships and carrying out offensive operations. BMP-2 infantry fighting vehicles were also used in the same exercise, simulating an Israeli or US attack on Iran.

Second: Efforts to Overcome Limited Capabilities

Although Iranian military equipment seems improved compared to previous military exercises, it remains far from being on par with its rivals and neighbors in many aspects. Notably, the exercises featured the new standard MASAV-2 rifles, replacing the German-made G3, along with 40mm MGL Qader-2 howitzers and PKM light machine guns. There was no indication that soldiers armed with MASAV-2 rifles used optical sights, which appear to have not yet been activated.

The most interesting development in the exercise was the deployment of the new JAS 313 jet-powered drone. This reconnaissance and strike aircraft is actually a scaled-down version of the previ-

ously displayed Iranian fifth-generation Qaher 313 fighter jet.⁽¹¹⁾ The IRGC views the jet-powered drone as a complement to its drone fleet. The IRGC Navy also displayed the JAS 313 taking off and landing from the recently commissioned Shahid Bahman Bagheri drone carrier, which was converted from a cargo ship called the Pararin. A 180-meter-long runway and eight aircraft hangars have been added to the carrier.⁽¹²⁾

As part of its conventional air assets, Iran deployed numerous US-made and domestically produced combat and tactical helicopters, along with Russian-made Mi-17s, MiG-29A, Tomcat F-14 AB-14, F-5E, Yak-130, Boeing 747 and C-130H aircraft of the Iranian Air Force participated in a series of exercises. Iranian officials have claimed to have received shipments of Su-35s, but there is no evidence of this in video footage or photographs.⁽¹³⁾

Iran also unveiled a new loitering munition called the Hadid-110. The drone is said to have a jet engine and a radar-evading design. Although the Mohajer-6 and Ababil-3 drones have been prominent among other Iranian tactical drones, the so-called modern systems such as the Rezvan loitering munition, the FVP and the Shahed-149 have been absent from published media content.⁽¹⁴⁾

Conclusion

Iranian exercises may impress the Iranian people — something the IRGC often seeks — but they do not have a deterrent effect on rivals. Iran's air force is very old, with a very limited number of air platforms and lacks beyond-visual-range missiles and AESA radars, which are essential defensive weapons. The Yak-130 aircraft, of which Iran has received four so far, are limited in range and weapons-carrying capacity, with their primary features focused on training rather than field combat. Acquiring more than 20 Su-35s would be a valuable addition to Iran's air force but integrating them fully with Iran's sys-

tems and manpower would take several years. The Israeli strikes have exposed the weakness of Iran's defensive capabilities, particularly in conducting jamming and protection operations. Iran's missile inventory, comprising both long- and short-range ballistic missiles, poses a serious threat to its enemies. A swarm of ballistic missiles could overwhelm enemy air defenses, as happened in October and earlier. Iran's small, fast-moving boats armed with anti-ship missiles could attack and threaten enemy naval vessels, but not beyond the waters of the Gulf. It can be concluded that the primary purpose of these exercises is operational preparedness for a potential third attack by Israel or the United States under Trump. However, Iran's ability to simulate a US or Israeli attack remains highly limited. Finally, it can be said that Iran lacks the ability to design or simulate realistic military scenarios based on the capabilities of fifth-generation combat aircraft and advanced air defense systems equipped with active electronically scanned array (AESA) radars.

Sophisticated Strategies and Solutions to Curb Declining Marriage Rates in Iran

The issue of reluctance to marry persists in Iranian society due to a combination of economic, political and social factors. The country's difficult economic conditions — exacerbated by international sanctions — have made marriage financially burdensome for many young people. Additionally, political instability has contributed to a climate of uncertainty, further discouraging long-term commitments. Sociological transformations, shifts in gender roles, rising educational and employment expectations, a lack of social security and negative personal and social experiences have all played a role in shaping this trend. Moreover, changing cultural influences — spread through

media, celebrities and cyberspace —have introduced alternative lifestyles that differ from traditional Iranian family values. These factors have prompted government interventions aimed at addressing the crisis and mitigating its long-term consequences, particularly concerns over an aging population. This file examines the government's efforts in two key areas.

First: The Effectiveness of Dating Apps and the Challenges Posed to Iranian Society

In recent years, Iranian authorities have often responded negatively to new social phenomena resulting from globalization, frequently framing them as aspects of a “cultural invasion.” One example of this is the blocking of dating applications and websites, which were blamed for the decline in marriage rates by offering alternatives that bypass the material and moral responsibilities associated with traditional family structures. However, as cyberspace has expanded and people have become increasingly reliant on the internet, the number of such platforms has continued to grow.

It now appears that the Pezeshkian government has begun viewing online matchmaking as a potential modern solution to address declining marriage rates. Deputy Minister of Youth Affairs at the Ministry of Sports Ali Reza Rahimi, recently announced a project to issue licenses for 205 dating websites as part of a strategy to encourage marriage through social networks. According to Rahimi, this initiative has been approved by both the Cultural Authority and Parliament, making it a legal and supported approach.

The new policy involves forming a team of experts tasked with evaluating the effectiveness of these matchmaking sites. Their goal is to assess their success in facilitating marriages, while also supervising and monitoring these under strict regulations. Rahimi empha-

sized that many of these platforms have already demonstrated effectiveness in increasing marriage rates, highlighting their potential role in addressing this social challenge.⁽¹⁵⁾

This new initiative may offer a potential solution to the issue of reluctance to marry, but it still faces significant challenges. The most notable of these is the conservative stance within the authorities who remain attached to their previous perceptions of dating websites despite the growing debate on the subject. While some officials see these platforms as a modern tool to encourage marriage, existing statistics raise concerns about their effectiveness. One Iranian source reported that such sites have largely failed, citing a high rate of abuse. According to the report, more than 90% of the relationships formed through these platforms are driven by sexual motives and involve moral violations, rather than serious intentions for marriage. Moreover, internet-based matchmaking has yet to become a widely accepted norm in Iranian society, and it carries its own social and cultural consequences. In terms of credibility, the statistics also suggest a stark gender disparity in motivations: while 90% of women reportedly join these sites seeking marriage, the percentage of men with the same goal is significantly lower.⁽¹⁶⁾

These platforms have the potential to yield both positive and negative outcomes. On one hand, they may succeed in facilitating connections between young people and serve as a viable alternative for those seeking a life partner. On the other hand, they are vulnerable to misuse, leading to moral violations and a host of complex social issues. Given the cultural and societal fabric of Iran, reliance on the virtual world for matchmaking may prove to be an unsuitable solution — one that risks deepening the problem rather than resolving it.

Second: Amendments to the Applicable Marriage Laws

As part of its efforts to address the decline in marriage rates, the Pezeshkian government introduced amendments to existing laws to facilitate and accelerate marriage among young people. These measures include increasing the value of low-interest marriage loans and easing access to them as an incentive to encourage marriage. In 2025, the loan amount was set at approximately 350 million tomans for men under 25 and women under 23, while other couples were eligible for 300 million tomans.⁽¹⁷⁾ This marked a 35% increase in loan value, with around 947,000 applicants registering for the loan that year, including 470,000 on the waiting list.⁽¹⁸⁾ However, several challenges persist for applicants, including stringent guarantor requirements, lengthy administrative procedures, lack of cooperation from certain banks, the insufficiency of loan amounts to cover living expenses, age restrictions and difficulties in repaying installments.⁽¹⁹⁾

Housing expert Dr. Fatemi Aqda emphasized that 30 million young people in Iran are in need of affordable housing. He stressed the necessity of constructing small and economical residential units and housing complexes that align with the financial conditions and needs of young people. Additionally, he called for flexibility in housing options to accommodate changing needs over time. Aqda also highlighted the importance of incorporating these considerations into overall housing planning from both economic and social perspectives.⁽²⁰⁾

Conclusion

The Pezeshkian government has approached the crisis of declining marriage rates with a modern strategy that may not fully align with the nature of Iranian society. The success of this approach depends on implementing strict laws and penalties for dishonest behavior among young people, ensuring continuous monitoring

and oversight of dating sites and transparently analyzing statistical data on successful marriages facilitated through these platforms.

Regarding marriage loans, the government needs to reduce bureaucratic hurdles, enhance banking oversight and simplify loan acquisition while also adjusting loan amounts to match inflation and the actual cost of living. However, while challenges related to dating sites have legal and cultural dimensions, the issue of bank loans is deeply tied to Iran's economic conditions, which remain difficult to address due to ongoing international sanctions. Given these accumulating and complex challenges, the effectiveness of the Pezeshkian government's solutions in resolving this crisis remains uncertain.

Divisions Within the Taliban and Regional Competition

Many reports have highlighted growing differences within the Taliban's leadership and factions, primarily stemming from ideological and political disputes, as well as struggles for influence and control. While these divisions are not new, they have recently intensified, particularly following the assassination of Khalil al-Rahman Haqqani, the Taliban government's minister of immigrants. This has fueled an atmosphere of mistrust and speculation among Taliban leaders.

Although these differences often appear to be rooted in ideological and intellectual disagreements, tribal rivalries and the overlapping interests of regional and international actors have deepened internal divisions and heightened polarization within the movement. This file aims to analyze the background, dimensions and causes of these internal fractures.

First: Deepening Divisions

A dispute has emerged within the leadership of the Islamic Emirate of Afghanistan, the Taliban government, revolving around two primary factions. The first is

the so-called Kandahari wing, led by the movement's Supreme Leader Mawlawi Hibatullah Akhundzada. The second is the Haqqani Network wing, led by Sirajuddin Haqqani, the current minister of interior, which some sources refer to as the Kabulwing.⁽²¹⁾

The differences between the two factions have deepened due to religious, social and political factors. The Kandahar wing represents a traditional faction with roots in the Deobandi school, whereas the Haqqani wing is primarily a military faction, originally composed of jihadist organizations that trace their origins to the Afghan jihad. Following the Taliban's takeover of Afghanistan, the Kandahar wing secured dominance over the government and state institutions, leaving the Haqqani wing feeling sidelined despite its significant military capabilities, logistical support and financial contributions.

Tensions escalated to the extent that the Taliban's leader issued a directive prohibiting the Ministries of Defense and Interior, along with the Intelligence Service, from opening weapons depots or distributing arms without his direct approval — an indication of the growing friction between Kabul and Kandahar. In a striking move that underscores the strained relations and lack of trust, Akhundzada appointed his personal guard commander Mawlawi Abdul Ahad Talib as the police chief of Kandahar Province. Talib now holds dual responsibilities: overseeing both the security of the Taliban's leader and the security of Kandahar Province in southern Afghanistan.⁽²²⁾

The key figures associated with the moderate or pragmatist wing within the Taliban government include Defense Minister Mullah Yaqoob, Interior Minister Sirajuddin Haqqani, Deputy Prime Minister Mullah Abdul Ghani Baradar and Information Minister Mawlawi Khairullah Khairkhawah.

On the other hand, the hardline faction, which holds significant influence over Taliban leader Akhundzada, is led by Justice Minister Abdul Hakim Haqqani, Religious Affairs Minister Noor Mohammad Saqib and Minister of Promotion of Virtue and Prevention of Vice MP Mohammad Khalid Hanafi.

Second: Causes of Contention

A major point of contention between the two factions within the Taliban government is women's education. Sirajuddin Haqqani and some leaders, such as Deputy Foreign Minister Sher Abbas Stanikzai, oppose the ban on girls' education, arguing that it damages the movement's international reputation and hinders official recognition of their rule. Afghan media circulated recordings attributed to Stanikzai, in which he reportedly stated that women's education is allowed in Islam and that the restrictions imposed reflect the personal desires of some senior officials,⁽²³⁾ implicitly referring to Akhundzada. Fearing arrest, Stanikzai later left Afghanistan for the UAE, claiming it was for "rest." Additionally, Sirajuddin Haqqani has criticized hardliner policies regarding women's issues and foreign relations. Beyond this, foreign policy remains another contentious issue. The Haqqani wing advocates for improved regional ties to alleviate international concerns and compensate for Western sanctions, while the Kandahari wing maintains a more hardline stance in this regard.

Third: The Role of International Actors and the Future of the Crisis Within the Taliban

Some analysts argue that while the Taliban's internal disputes are rooted in ideological, political and economic factors, external actors — particularly Pakistan, Iran, Russia, China and some Gulf states — also play a role in influencing the movement's internal dynamics. These countries seek to protect their strategic

interests and have established relationships with different Taliban factions, sometimes leading to conflicting external pressures that influence the movement's leadership disputes.

For Iran, a divided Taliban serves its interests. Tehran may exploit these internal divisions by negotiating with one faction against another or by weakening the Sunni Taliban movement to advance its own regional influence. This could involve supporting rival armed groups or fostering internal instability to ensure that Afghanistan remains a space where Iran can exert leverage and secure its interests.

Pakistan is concerned that Afghanistan under the Taliban's rule could become a safe haven for militants from Tehrik-i-Taliban Pakistan (TTP), who seek to overthrow the government in Islamabad or launch terrorist attacks inside Pakistan. Over the past two years, TTP-linked attacks have escalated, leading to Pakistani military strikes inside Afghanistan, which in turn triggered Taliban retaliatory shelling against Pakistan.

India strongly condemned Pakistan's strikes in Afghanistan, further complicating regional dynamics. On January 1, 2025, the Afghan foreign minister met with his Indian counterpart in the UAE, after which the Afghan Foreign Ministry stated that it views New Delhi as an important regional and economic partner.⁽²⁴⁾ This alarmed Pakistan, which has long viewed Indian influence in Afghanistan as a threat to its geopolitical interests.

The assassination of Khalil ur Rehman Haqqani further strained ties between Pakistan and the Taliban, as some Taliban factions suspect Pakistan's involvement in the attack. These factions believe that Islamabad either facilitated the attack by ISIS militants or directly aided the assassiants, whom the Taliban has labeled "Kharijites."

The UAE has developed strong ties with the Taliban, particularly with the Haqqani wing. In June 2024,⁽²⁵⁾ Sirajuddin

Haqqani, the Afghan interior minister, along with General Intelligence Chief Abdul Haq Wasiq, visited the UAE and met with President Mohammed bin Zayed. This visit was Haqqani's first foreign trip since the Taliban took power, highlighting the UAE's strategic engagement with his faction.

Further strengthening ties, the UAE became the second country — after China — to formally accept a Taliban ambassador, appointing Mawlawi Badruddin Haqqani to Abu Dhabi in August 2024. This move signals Abu Dhabi's commitment to maintaining its influence in Afghanistan.

Meanwhile, Qatar also maintains close relations with the Taliban, particularly with its pragmatic wing. However, Doha appears frustrated with the hardline faction, which has hindered the Taliban's efforts to engage with the international community.

This regional and ideological rivalry within the Taliban is further complicated by tribal rivalries, as certain tribes hold more prominent positions, creating sensitivities within the movement. For instance, the Durrani tribe has played an active role, while sub-tribes like the Noorzai-Ishaqzai have been involved in managing the movement's financial affairs. These tribal dynamics often intersect with ideological differences, exacerbating internal divisions and fueling disputes within the movement.⁽²⁶⁾

The bottom line is that if the Afghan government fails to manage internal differences, it risks fragmentation and division, potentially leading to internal fighting among its forces or major splits within its structures. Currently, this is prevented by a strong culture of absolute obedience to the movement's leader. However, this dynamic may change as the leader ages, as influential figures gain more control over decision-making due to their proximity to power, and as traditionalist leaders continue to approach

complex political and social challenges through a rigid, outdated perspective. Additionally, economic and political crises, both domestic and international, could further destabilize the movement.

Conclusion

So far, the Taliban government appears capable of managing internal crises and differences among its leaders. While these disputes are visible, they have not yet undermined the government's apparent cohesion —perhaps due to the centrality of

obedience to the movement's leader. This principle is deeply rooted in the Hanafi and Maturidi traditions, which form the Taliban's jurisprudential and theological foundation. However, the lack of a formal Constitution, growing personal rivalries among leaders, unilateral decisions and the self-serving interventions of external powers could eventually lead to divisions within the movement. Such fragmentation may undermine its effectiveness in governing a large, tribal society marked by cultural and sectarian diversity.

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IRAN-ARAB INTERACTIONS

Iranian interactions with some Arab countries, such as Iraq and Syria, have witnessed significant developments. After suffering historic losses at the regional level, Iran has turned its attention to Iraq as the next target in its efforts to maintain regional influence. The Iraqi arena is also witnessing rapid developments related to internal and external dynamics, as various actors seize the opportunity to shift the current equation to Iran's disadvantage in the upcoming parliamentary elections. In Syria, Iran is closely monitoring the recent Russia-US rapprochement, especially after the meeting between the Russian foreign minister and his US counterpart in Riyadh. This meeting sparked controversy within Iran regarding its timing and the extent to which the restoration of Russia-US relations could impact Iranian interests in Syria. These developments are discussed through:

- Iran's Internal and External Calculations in the Iraqi Arena
- Lavrov Visits Tehran as Concerns Mount Over a Russo-US Rapprochement That Could Impact Iran's Interests in Syria.

Iran's Internal and External Calculations in the Iraqi Arena

Since the regional developments in which Iran suffered historic losses, attention has turned toward Iraq as the subsequent target to weaken Iranian regional influence. The Iraqi arena is witnessing rapid developments related to internal and external dynamics aimed at seizing the opportunity to change the existing equation to Iran's disadvantage in the upcoming parliamentary elections. At the same time, Iran is making efforts to engineer the stage and protect its gains in Iraq, particularly in light of a potentially altered political landscape after the upcoming legislative elections scheduled for October. However, the question remains: Will these efforts lead to changes in the Iraqi equation during the next stage? Are the transformations in Iraq more dependent on internal or external factors, or both? To what extent will Iran's political machinations affect the future of its influence in Iraq?

First: Internal Moves to Change the Iraqi Equation

Iraq is witnessing near-daily developments, including moves by political alliances and regional and international actors opposed to Iranian influence in Iraq. The goal is to restore Iraq's statehood and move away from the prevailing militia dynamic. On the domestic front, the first key indicator is the unification of five prominent Sunni alliance leaders⁽¹⁾ who have come together to form the Unified Sunni Leadership Coalition. This alliance presents itself to both internal and external parties — particularly neighboring Arab states supporting a national Iraqi state — as capable of managing the upcoming political scene and uniting to enhance their chances in the parliamentary elections.

The second key indicator is Muqtada al-Sadr's readiness to return to political life after announcing his withdrawal from

politics in August 2022. He has called on his supporters — estimated in the millions — to update their electoral records, signaling his imminent political resurgence. This follows his rare meeting with Grand Ayatollah Ali al-Sistani and the re-branding of his movement as the Shiite National Movement, aimed at breaking sectarian barriers and moving toward a broader national framework. This poses the biggest challenge to the Coordination Framework in the upcoming elections.

Sadr's influence extends horizontally across the southern governorates, giving him the largest and most significant popular base within the Shiite community. His influence also penetrates vertically into state institutions, and he enjoys a strong seminary legacy inherited from his distinguished family. Additionally, his political rhetoric aligns with both civil and Sunni-Shiite movements that seek to transcend sectarianism, build a nation state and alter the political balance at the expense of the Coordination Framework.

The third key indicator is the return of former Prime Minister Mustafa al-Kadhimi to Iraq after a period of absence following his departure from office. His absence was largely due to militia threats against his life and accusations of involvement in the Soleimani killing case. His return suggests that he remains a pivotal political figure, especially as current Prime Minister Shia' al-Sudani struggles to secure a second term due to his failure in managing US demands and internal challenges — particularly the lack of consensus within the Coordination Framework on controlling militias and unregulated weapons proliferation. Kadhimi was also seen as a balanced figure, both domestically and internationally, due to his alignment with state-building efforts and his ability to maintain a degree of equilibrium in Iraq's foreign relations. His acceptability in the Gulf and among Western powers makes him, a viable alternative who can maintain regional

stability while managing relations with the Trump administration and the Gulf states.

Second: External Moves to Pressure the Iraqi Government

Türkiye has sought to play an active role in Iraq, particularly through its foreign minister's visit to Baghdad. Ankara sees an opportunity to expand its influence amid Iran's anticipated weakening in Iraq. At the same time, Türkiye is strengthening its regional role by pushing for the formation of a Turkish-Iraqi-Syrian-Jordanian security quadrilateral axis, which would enhance Türkiye's influence in the region and bolster its ability to confront the Kurdistan Workers' Party (PKK). The visit also revealed an unprecedented Turkish stance on the PKK, which observers interpret as a precursor to the military operations Ankara has since carried out against the group. This development led to the acceptance of a call from Abdullah Öcalan, the PKK's imprisoned leader in Türkiye, for the group to lay down arms after four decades of conflict. The Trump administration is also exerting intense pressure on Iraq, starting with demands that the state monopolize weapons control and end Iraq's exemption from US sanctions against Iran.⁽²⁾ On February 27, 2025, US Secretary of State Marco Rubio delivered strong warnings to the Iraqi government during a visit to Baghdad, demanding that Iraq curb Iranian influence and ensure its energy sector's independence. The Coordination Framework sees these demands as direct threats to Iranian interests in Iraq, raising fears of potential US sanctions targeting pro-Iran entities, banks, individuals and possibly even penalties against pro-Iran figures.

Third: Iranian Engineering to Preserve Gains in Iraq

To mitigate the impact of shifting Iraqi alignments and circumvent US pressure on Sudani regarding unregulated

weapons proliferation, Iran has sought to reinforce the Popular Mobilization Forces (PMF) as a red line. This was evident when Khamenei met with Sudani in Tehran, stating, "The Popular Mobilization Forces constitute one of the important elements of power in Iraq and must be preserved and strengthened to a greater extent."⁽³⁾ Iran is exploring adjustments to the PMF's structure, potentially integrating it further into the armed forces while ensuring it remains a parallel army akin to Iran's Islamic Revolutionary Guard Corps (IRGC). The Coordination Framework's leaders, backed by Iran, categorically reject any move to dismantle or weaken the PMF, citing religious (Sistani's fatwa on jihad), legislative (the 2016 law integrating the PMF into the army) and security (its role in fighting ISIS) justifications. A draft law has been introduced in the Iraqi Parliament aimed at amending the PMF's legal framework. Key provisions include raising the retirement age to 70 and establishing mechanisms for replacement, ensuring that dismissed members can be immediately substituted to maintain the PMF's numbers. This proposal seeks to prevent the retirement of approximately 4,000 PMF members,⁽⁴⁾ including senior figures such as Falih al-Fayyadh, Abu Fadak (Abdul Aziz al-Muhammadawi) and Abu Zainab al-Lami. The law's introduction has sparked widespread controversy in Iraq, with Sunni, civil and liberal political forces opposing its passage. Some political forces are considering a compromise that would allow the prime minister to extend the retirement age for PMF leaders by five years, providing time to find replacements. Iran and the Coordination Framework recognize that Iraq's next Parliament is unlikely to replicate the current pro-Iran majority, making these legal amendments crucial for maintaining their influence before power shifts occur.

Conclusion

The interplay of external and internal factors has disrupted Iraq's political status

quo, as the country becomes a focal point in the US strategy to weaken Iranian influence in the Middle East. However, external forces have played the primary role in shaping these developments, creating opportunities for internal actors to gain leverage. As a result, Iraq is poised for major transformations in the coming weeks and months, most of which are unlikely to favor Iran. The anticipated shift toward a focus on statehood will likely curtail militia influence in Iraqi decision-making and elevate cross-sectarian alliances — particularly the Sadrist bloc, Sunni factions, Kurds and civil movements. However, a crucial question remains: Has Sadr matured politically to avoid repeating the 2022 scenario, or will he once again withdraw from Parliament, handing the political arena back to Iran's allies?

Lavrov Visits Tehran as Concerns Mount Over a Russo-US Rapprochement That Could Impact Iran's Interests in Syria

Iran is closely watching the recent thaw in Russia-US relations, particularly following the meeting between Russian Foreign Minister Sergey Lavrov and his US counterpart Marco Rubio in Riyadh. In this context, Lavrov's visit to Tehran aimed to address the implications of this rapprochement on the Syrian conflict and bilateral ties between Tehran and Moscow. The visit has sparked considerable debate within Iran, raising questions about its timing and the potential impact on the future of Russian-Iranian cooperation in Syria and the broader region. Concerns have also emerged over whether these developments could threaten Iran's regional interests, particularly in Syria.

First: Contexts of Lavrov's Visit to Tehran

During his visit to Iran, Lavrov held talks with senior Iranian officials, focusing on regional and international developments. His visit took place at a crucial

moment, coinciding with significant internal Iranian shifts and broader geopolitical changes. One of the key factors shaping these discussions was the joint setback experienced by both Iran and Russia in Syria following the fall of Bashar al-Assad in December 2024, which led to a convergence of their views on Syria's new ruling authority. The visit also came just a month after Iranian President Masoud Pezeshkian's visit to Moscow and the signing of a comprehensive cooperation agreement, which was viewed as the start of a new phase in bilateral relations. However, despite the strengthening of Russia-Iran ties, Iran remains apprehensive about Russia's foreign engagements, particularly given the recent warming of Russia-US relations and the mini-summit held in Riyadh between Rubio and Russian officials regarding the Russia-Ukraine war. Adding to Tehran's concerns is the mounting economic and military pressure on Iran, with US President Donald Trump reinstating the "maximum pressure" policy. This has included efforts to bring Iran's oil exports to zero and the imposition of new sanctions targeting companies and officials linked to the Iranian oil industry.

Lavrov's visit to Tehran appears to be an effort to reassure Iran and address its concerns amid shifting geopolitical dynamics. However, it has not fully alleviated Iranian fears that the growing Russia-US rapprochement could lead to a regional realignment that may not be in Tehran's favor, particularly regarding developments in Syria.⁽⁵⁾

Second: Iranian Perceptions Regarding the Timing of the Russian Visit

Although Iran and Russia recently signed a comprehensive strategic agreement aimed at strengthening bilateral ties, Lavrov's visit to Tehran highlighted divisions within the Iranian leadership regarding its implications amid the Russia-US rapprochement. While official Iranian bod-

ies reaffirmed their commitment to continued cooperation with Moscow, some voices expressed concern, pointing to the timing of the visit, preceding developments and Russia's apparent interest in easing sanctions pressure through closer ties with Washington. This rapprochement presents a strategic challenge for Tehran, raising questions about its potential impact on Russia's regional priorities and its cooperation with Iran, particularly in Syria. Any shift in Russia's stance could affect Tehran's political and military influence in Syria and its broader regional calculations.

Tehran's primary concern today is that Russia's stance on the fall of the Assad regime could set a precedent, potentially exposing Iran to similar setbacks and further diminishing its regional influence.⁽⁶⁾ This fear is reinforced by Moscow's pragmatic approach to its interests, which often diverge from those of its allies. Russia's apparent reluctance to offer support to Iran in the event of a confrontation with Israel only deepens Iranian anxieties. Many in Tehran worry that a potential deal between Moscow and Washington could come at Iran's expense, underscoring the need to closely monitor Russia's shifting priorities to avoid becoming a bargaining chip in a broader agreement between Putin and Trump.⁽⁷⁾

Tehran's leadership is grappling with the region's rapidly shifting dynamics,

particularly as its ties with Moscow weaken while Russia deepens its relations with Saudi Arabia and Türkiye — both of which have hosted Russia-US talks. Ankara, in particular, has bolstered its position in Syria and expanded its regional influence following Iran's retreat, a shift further compounded by Kurdish leader Abdullah Öcalan's call for the Kurdistan Workers' Party (PKK) to disarm. This development threatens to deprive Iran of a key leverage tool it has long used to pressure Türkiye, allowing PKK activities along the Iranian-Iraqi border. If the group disbands or halts its military operations, Tehran will lose one of its remaining bargaining chips with Türkiye, Russia and the United States.

Conclusion

Despite the benefits Moscow stands to gain from its rapprochement with the United States, it still requires deeper ties and alliances with Tehran due to their overlapping international and regional interests, stretching from the Caucasus and Central Asia to the Middle East. At the same time, Iran is unlikely to assume that the Russia-US rapprochement will significantly diminish Moscow's support for its stance, particularly in Syria. However, this situation may push Tehran to recalibrate relations with Russia and reassess its regional alliances accordingly.

Endnotes

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(2) This punitive measure deprives Iraq of its share of Iranian gas and electricity and leaves Iraq facing a complex electricity crisis that becomes more severe in the summer, as the Iranian share represents a third of Iraq's electricity supply.

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IRAN'S RELATIONS WITH INTERNATIONAL POWERS

US-Iran relations have witnessed a significant increase in tensions, with Trump's return to the policy of "maximum pressure" and Iran's refusal to negotiate under duress.

Regarding Iran's relations with Europe, the International Atomic Energy Agency (IAEA) revealed in two confidential reports that Tehran continues to violate its nuclear commitments by increasing its enriched uranium stockpile. The European Union has called on Iran to return to its commitments and implement all measures related to the monitoring and inspection of nuclear facilities.

With respect to Russia, the Iranians fear that any rapprochement between Washington and Moscow could impact the future of their relations and interests with Russia. These developments are addressed through the following topics:

- Iranian Reactions to Trump's Coercive Diplomacy

- IAEA Reports Reveal Iran's Nuclear Violations

- The Impact of Russo-US Understandings on Iran.

Iranian Reactions to Trump's Coercive Diplomacy

The United States and Iran have entered a new phase of confrontation as evidenced by US President Donald Trump's effective reinstatement of the maximum pressure strategy against Iran on February 4, 2025. Iran responded to this move by retreating from its policy of understanding and engagement and refusing to negotiate under pressure. Instead, it called for a revival of its old policies of resisting pressure. What are the US objectives behind this escalation, given that diplomacy had been the priority? What are the cards Iran is betting on during this critical phase for its internal and regional aims? Where are relations heading during this critical phase?

First: US Pressure for a New Agreement

In a move that signals the United States' return to a policy of maximum pressure on Iran, Trump signed a presidential memorandum under which Washington reimposes a policy aimed at preventing Tehran from acquiring a nuclear weapon, limiting its oil exports and changing its regional policies. Washington's pressure essentially aligns with Trump's approach of placing intense pressure on his opponents to conclude favorable deals. This can be understood from what Trump

wrote on his Truth Social platform: "I hope we don't have to use the memorandum, and we'll see if we can reach a deal with Iran."⁽¹⁾

The United States has already started implementing this memorandum by imposing sanctions on entities, vessels and companies involved in Iranian oil exports. The US Treasury Department's Office of Foreign Assets Control black-listed 175 crude oil tankers out of a total of 445 involved in the Iranian oil trade. The United States has also imposed sanctions related to drones. In addition, the US president has many levers over Iran. The ruling establishment is facing a grave domestic crisis and may not be able to withstand further sanctions. This could lead to an unprecedented wave of protests, similar to those that erupted in early 2018 after Trump imposed his maximum pressure policy on Iran. Iran's regional influence is also significantly eroded, and Israel is threatening to launch a military campaign against Iranian nuclear facilities. There appears to be complete agreement and harmony between Netanyahu and Trump regarding Iran. Trump's rapprochement with Russia may affect Russia's support for Iran, and the sanctions may also impact Tehran's relationship with Beijing. However, Trump has not ruled out his country's willingness to ne-

Sanctions Imposed by the Trump Administration on Iran During February 2025

Date	Sanctions
February 6	Sanctions on an international network that funnels illicit revenues to the Iranian army.
February 24	The US State Department designated 16 entities and vessels for their involvement in Iran's oil and petrochemical industries.
February 26	The United States imposed sanctions on six entities based in China, including Hong Kong, for their involvement in supplying key components to entities linked to Iran's drone and ballistic missile programs.

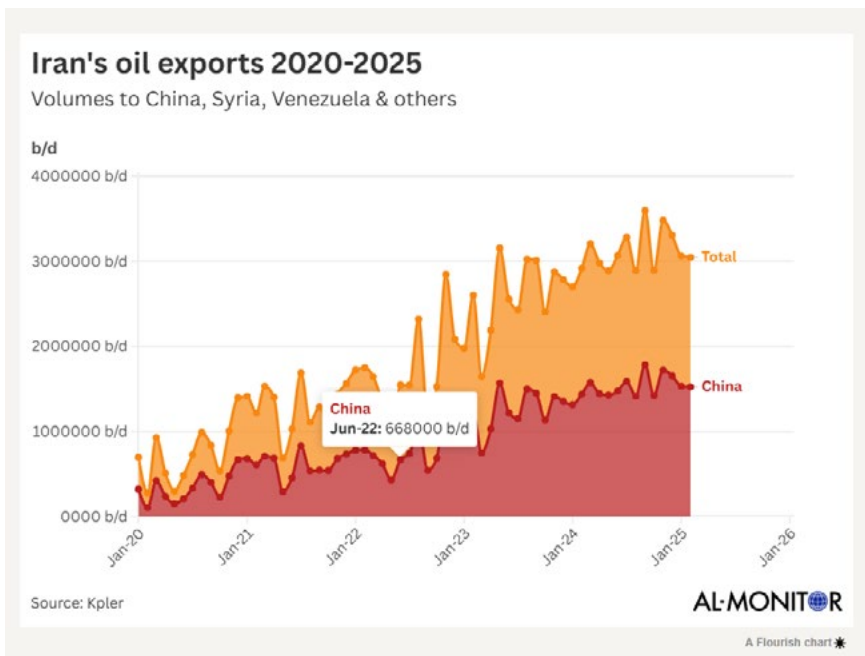
Prepared by Rasanah Institute

gotiate with Iran regarding a new nuclear agreement. This policy reflects Trump's previous strategy adopted during his first term (2017-2020) after withdrawing from the nuclear agreement in 2018. The ultimate goal was to persuade Iran to sign a new agreement instead of the existing nuclear agreement.

Second: Iran's Rejection of Pressure and Limited Maneuverability

Before Trump reinstated the effectiveness of maximum pressure, Iranian Supreme Leader Ali Khamenei encouraged the Pezeshkian government to pursue diplomacy under the principle of "dealing with caution" due to the deep-rooted distrust of the United States. The Pezeshkian government believed that the way to rescue the country from its deteriorating situation was through reaching an understanding with the United States and the West. However, once Trump reinstated the maximum pressure strategy, attitudes in Iran hardened, with a refusal to yield to US demands under pressure

and sanctions. There is no doubt that the "hardliner" movement has found in Trump's policy an opportunity to retreat from diplomacy, renew its ideological discourse toward the United States and cast doubt on any diplomatic path. This was expressed by the supreme leader, who said, "Experience has proven that negotiating with America is futile." Khamenei added that any attempt to negotiate with Trump is "irrational and not honourable." It appears that a consensus regarding dealing with the Trump administration has begun to form within the Iranian domestic sphere. Following the supreme leader's statement, Pezeshkian announced his commitment to the supreme leader's directives. Iranian Foreign Minister Abbas Araghchi also expressed his country's rejection of direct negotiations with the United States while Trump continues to pursue the policy of maximum pressure. There is no doubt that Trump's treatment of Ukrainian President Volodymyr Zelenskyy in the White House has given the "hardliners" an opportunity to



emphasize their lack of trust in Washington and cast doubt on the “reformists” orientations. It appears that the ruling establishment’s success in hardening its position strengthened Zarif’s conviction to resign, viewing the path to diplomacy as currently closed. Despite the challenges, Iran continues to exert pressure by continuing to advance its nuclear capabilities, as confirmed by the International Atomic Energy Agency (IAEA), which issued a report stating that Iran has accelerated the production of weapons-grade uranium. Meanwhile, Tehran has continued to communicate with European parties to thwart Trump’s efforts to build an anti-Iran consensus and exploit transatlantic tensions to avoid returning to the Security Council and the implementation of the snapback mechanism. While Iran has leverage, there are real difficulties at home. The currency is plummeting, oil exports are declining and Iran’s regional project is weakening. Any miscalculation could lead to an unprecedented confrontation with the United States, potentially leading to military action. It appears that these sanctions are beginning to bear fruit, as some reports indicate a decline in Iranian oil exports.

Conclusion

Washington’s policy toward Iran is based on exploiting the complexities surrounding the Iranian ruling establishment and exerting increased pressure on it to bring it to sign a new agreement that is not limited to the nuclear issue but also includes other thorny issues, such as its regional role, ballistic missile program and drone program. This policy is a replication of Trump’s strategy during his first term, but it is being implemented under a more cohesive and aggressive administration toward Iran and amid the complex circumstances facing the Iranian leadership internally and externally.

Washington may have taken this po-

sition early, which appears to contradict Trump’s declaration of readiness to negotiate, in order to preempt and thwart the policy of buying time and the strategy of resistance through which Iran has previously succeeded in circumventing maximum sanctions. This policy is expected to yield one of two outcomes: either bringing the Iranian leadership to the negotiating table or confrontation with Trump. What is clear so far is that Iran’s ruling establishment, based on its deeply entrenched hostile identity, appears unwilling to submit to the coercive diplomacy pursued by Trump. That is, it is moving toward confrontation, resistance and circumventing sanctions. However, based on the facts on the ground, the success of this strategy will not come without a cost. The losses it suffered during Trump’s first term may exceed those incurred, as the military option enjoys greater support within the new Trump administration. Therefore, if the ruling establishment senses a threat to its survival, it may reconsider the option of confrontation and return to negotiations through Russian mediation.

IAEA Reports Reveal Iran’s Nuclear Violations

The International Atomic Energy Agency (IAEA) released two confidential reports on Iran in February 2025, one on verification and monitoring and the other on the Safeguards Agreement of the Nuclear Non-Proliferation Treaty (NPT). These reports were issued against the backdrop of Iran grappling with new political dynamics under US President Donald Trump’s second term. Both reports present some disturbing facts for the IAEA’s management. These reports reflect the agency’s findings from last June, which resulted in the IAEA’s condemnation of Iran. They highlight Iran’s multiple ongoing violations of the Joint Comprehensive Plan of Action (JCPOA) and the NPT as well as Iran’s capabilities to produce weap-

ons-grade uranium. This file highlights the key findings of these reports and the information regarding Iran's progress in uranium enrichment.

First: Alarming Warnings

The two reports issued by the IAEA on Iran contain a common paragraph, "The significant increase in the production and accumulation of highly enriched uranium by Iran — the only non-nuclear-weapon state producing such nuclear material — is of grave concern to the IAEA."⁽²⁾ The IAEA also confirmed that Iran's stockpile of 60% enriched uranium has grown by half, without any progress in resolving the contentious issues, particularly regarding traces of enriched uranium found at undeclared sites such as Lavizan-Shiyan, Varamin, Marivan and Turqzabad. Tehran's stockpile of 60% enriched uranium in uranium hexafluoride has increased from 92.5 kilograms to 274.8 kilograms. Thanks to its growing capabilities, Iran is accelerating its monthly enrichment of uranium to between 35 kilograms and 40 kilograms, compared to the previous monthly production of 6 kilograms to 9 kilograms. This level of enrichment would be necessary to produce a nuclear bomb. According to the IAEA, approximately 42 kilograms of uranium enriched to 60% is sufficient to produce one atomic bomb, if further enriched to 90%. However, Iran deliberately avoids this step despite having the capacity to produce such quantities and the availability of more advanced centrifuges. Its stockpile of 274.8 kilograms of uranium enriched to 60% purity can be processed to 90% purity to produce 174 kilograms of weapons-grade uranium within three weeks at the Fordow Fuel Enrichment Plant. Therefore, Iran has enough highly enriched uranium (HEU) to produce seven nuclear bombs, each weighing 25 kilograms. Iran complied with the IAEA's request and permitted enhanced safeguards at the Fordow Fuel Enrichment Plant. The IAEA also re-

ported implementing an enhanced safeguards approach at a nuclear material storage facility in Isfahan,⁽³⁾ where much of Iran's stockpile of 60% HEU and 20% enriched uranium is believed to be stored. Tehran has not reported any stored HEU at this facility. The IAEA's ability to verify Iran's nuclear activities, particularly uranium enrichment, has been significantly reduced since Iran refused to grant the IAEA regular inspections in accordance with its obligations under the NPT. However, based on information provided by the Atomic Energy Organization of Iran, the total stockpile of enriched uranium — in both enriched and chemical forms — is estimated to have increased by approximately 1,690 kilograms, bringing the total to 8,294.4 kilograms. Iran has long prioritized increasing its uranium enrichment capacity to 60% rather than consistently producing 2% to 5%. For example, reports indicate that the Fordow plant is being used to produce 60% HEU from 20% enriched feedstock, rather than 5% raw material. Another significant development in this context is the increased enrichment speed Tehran has achieved since last December, thanks to the deployment of two cascades of IR-6 centrifuges, which has increased the monthly average sevenfold. To further refine its capacity, Tehran continues to enrich 60% HEU from 5% low-enriched uranium at the Pilot Fuel Enrichment Plant. The current HEU production rate can be maintained for six months, a conclusion reached based on the composition of the feedstock and the operation of the centrifuge cascades. Iran currently claims to have 13,355 advanced centrifuges at its Natanz and Fordow enrichment facilities. With the addition of the IR-1 centrifuges, it now has 20,600. However, it should be noted that Iran does not operate all of these centrifuges simultaneously, nor do they all enrich uranium. Iran's total enrichment capacity is approximately 58,800 quarterly work units (WU) per

year, but it is currently enriching approximately 43,800 WU per year. Iran's capacity to build centrifuges remains unknown, as does the number of stored centrifuges, which is unprecedented for a state that is a member of the NPT. Information about Iran's nuclear material storage cannot be verified, which heightens concerns about weaponization. Iran's refusal to comply with the Additional Protocol to the Comprehensive Safeguards Agreement weakens the IAEA's monitoring capacity and significantly complicates its relationship with Tehran. The IAEA reports conclude that the agency had "lost continuity of knowledge related to the production of the current stockpile of centrifuges, rotors, blowers, heavy water, and uranium ore concentrate, which cannot be retroactively obtained." Furthermore, Iran's nuclear expertise gained over the years — including developing the know-how to build centrifuges, enrich uranium and handle and store materials at various stages — cannot be erased, even if it returns to full compliance with its obligations under the IAEA Additional Protocol and the NPT. The policy of refusing to engage in talks with the Trump administration while continuing to enrich and store uranium to 60% purity indicates that Tehran is in a hurry to exploit the absence of IAEA inspectors to achieve its potential weapons-grade goal.

Second: The European Position on Developments

The European Union (EU), which has adopted a different approach than the United States in dealing with political changes, has not taken a lenient stance toward Iran. The EU noted that "Iran is the only non-nuclear-weapon state that systematically produces and stockpiles highly enriched uranium." The EU, reiterating the concerns of the IAEA, requested Iran to adhere to its nuclear commitments, "In light of these multiple and serious concerns, we strongly urge Iran to reverse its

troubling nuclear trajectory and return to its non-proliferation obligations without further delay. We also urge Iran to return to the provisional implementation of the Additional Protocol, ratify it, and resume implementation of all monitoring and verification measures related to the Joint Comprehensive Plan of Action."⁽⁴⁾

Iran responded to the IAEA reports, Trump's warning and the EU's concerns by replacing its ambassador to Austria and permanent representative in Vienna with Reza Najafi, the former deputy foreign minister who was part of the Iranian team that negotiated the JCPOA.

Conclusion

This second consecutive rebuke by the IAEA of Iran for its failure to comply with its monitoring and inspection obligations, its prioritization of the storage of HEU and its failure to respond to questions about four undeclared sites places Iran in a vulnerable position — not only with the United States but also with the EU. The likelihood of the existence of unknown underground nuclear storage and weapons assembly sites connected to Iran's underground air and missile bases is increasing. Tehran's refusal to enter new nuclear talks may indicate that it is enriching uranium to 60% within three weeks and amassing enough to produce several nuclear weapons, ensuring that it remains on alert for any potential attack on its nuclear sites. In such a situation, the tendency toward nuclear war may prevail rather than deterrence.

The Impact of Russo-US Understandings on Iran

Russia-US talks in February 2025, marking the first high-level dialogue between the two powers since the onset of the Russia-Ukraine war, have sparked concerns in Tehran. Iranian officials are closely monitoring the outcomes of these discussions, wary of their potential impact on Iran's strategic ties with Moscow. The

timing of the talks was particularly sensitive, as Iran has been working to deepen its partnership with Russia, especially in response to mounting Western pressure. This effort was reinforced by the signing of a strategic partnership agreement between the two countries in January 2025. Against this backdrop, questions arise regarding Iran's response to renewed Russia-US engagement and the possible ramifications for Russia-Iran relations moving forward.

First: Backdrop and Iranian Reactions

Russia-US understandings on the Russia-Ukraine war come at a pivotal moment for Iran, coinciding with the recent signing of a comprehensive partnership agreement between Tehran and Moscow. Iran views this agreement as a crucial tool for navigating its various crises and challenges. Domestically, the partnership is particularly significant as both Iran and Russia grapple with US sanctions that have strained their economies. The economic dimension of the agreement is especially critical, facilitating financial transactions between the two nations while reducing reliance on the US dollar and creating avenues to circumvent Western sanctions.

As Iran contends with security and sovereignty challenges posed by Israeli and US threats, its partnership with Moscow is seen as a means to counterbalance the US-backed Israeli alliance. Strengthening Iran's defenses against potential attacks on its critical infrastructure is a key objective of this cooperation. Recent Israeli strikes have reportedly dealt significant blows to Iran's defense capabilities, making the agreement with Moscow particularly strategic. It paves the way for Tehran to gain military expertise and enhance its air defense systems, as well as bolster its offensive air capabilities through the acquisition of Su-35 fighter jets.

Moscow maintains significant rela-

tions with several of Iran's regional allies, including armed groups in Yemen, Syria, Lebanon and Iraq. In recent times, Iran's regional alliance has faced setbacks, posing challenges to its efforts to regain influence and strengthen its affiliated groups. To curb the erosion of its regional standing, Tehran continues to rely on Moscow's support, viewing its partnership with Russia as a crucial factor in stabilizing and reinforcing its network of allies.

Russia plays a crucial role in supporting Iran on the international stage, particularly by providing diplomatic cover in the UN Security Council alongside China. As US President Donald Trump pushes to tighten pressure on Tehran in an effort to compel it into signing a new agreement on its nuclear program and other contentious issues, Moscow's continued backing remains especially significant for Iran at this critical juncture.

Russia-US talks have sparked concerns and debate within Iranian circles, prompting speculation that Russian Foreign Minister Sergei Lavrov's visit to Tehran aimed to reassure Iranian officials and possibly discuss a mediation role with Washington. However, apprehensions persist in Iran that a potential rapprochement between Moscow and Washington, coupled with the resolution of their conflicting interests in the Russia-Ukraine war, could impact Russia's commitments to Tehran. There is growing unease that Moscow might deprioritize its partnership with Iran or even compromise its strategic agreement with Tehran in favor of improving relations with the United States.

Second: Impact of the Talks on Relations

The potential rapprochement between the United States and Russia carries significant implications for Moscow's relations with Tehran. A Russia-US agreement could present challenges for Iran,

particularly if it leads to the lifting of US sanctions on Russia. Such a development might reduce Moscow's reliance on Tehran as an economic partner, especially in key sectors like energy and transportation. As a result, the economic benefits Iran anticipates from its strategic partnership with Russia could be significantly diminished.

Recent Russia-US talks highlight Moscow's efforts to maintain a balanced approach in its regional and international relations, a move that could put Iran in a difficult position. Despite the strategic partnership between Moscow and Tehran, Russia may seek to diversify its ties with the Gulf states and China while also pursuing a more positive trajectory with the United States to secure broader economic and security benefits. This shifting dynamic could push Iran to reconsider its foreign policy strategies in response to Moscow's evolving priorities.

Furthermore, the agreement could influence military cooperation between Russia and Iran, particularly if Moscow prioritizes its war in Ukraine, dedicating its military and security focus to that conflict while sidelining its commitments to Tehran. Such a shift would have negative repercussions for Iran, which regards Russia as its primary supplier of weapons and missiles. This could, in turn, weaken Iranian forces and Iran-aligned groups abroad, affecting both their military and security capabilities.

Finally, Russia may show less willingness to implement its agreement with Tehran at the same pace, especially as it continues to diversify its partnerships with other key players like Saudi Arabia and China. This shift could result in delays or setbacks in some provisions of the agreement with Iran.

However, these talks are not without potential benefits for Tehran. Russia could take on a mediating role between Iran and the United States on critical issues such as the nuclear program or economic sanctions. If successful, this mediation could help ease pressure on Iran, with significant implications both domestically and internationally.

Conclusion

Recent Russia-US talks signal a shift in the region's geopolitical landscape, as Moscow recalibrates its partnerships to align with its strategic interests —potentially at the expense of its ties with Tehran. However, the future of Russia-Iran relations remain uncertain and will be shaped by upcoming developments. While these developments may present challenges for Iran, they could also create new opportunities for cooperation based on emerging geopolitical balances. Ultimately, the trajectory of bilateral relations will depend on how both countries navigate these shifts and their ability to secure mutual interests in an evolving international environment.

Endnotes

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(4) "EU Statement at the IAEA Board of Governors on Verification and Monitoring in the Islamic Republic of Iran in Light of United Nations Security Council Resolution 2015) 2231)," Delegation of the European Union to the International Organisations in Vienna, March 2025 ,4, accessed March 2025 ,05, <https://n9.cl/6pxxg>.

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