

MONTHLY REPORT

Iran Case File

August 2025

Your window on Iran from inside and abroad





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EXECUTIVE SUMMARY

In August 2025, Iran's domestic landscape was marked by a flurry of political, economic, military, social and ideological developments, while its regional and international interactions grew increasingly complex. These overlapping dynamics are expected to weigh heavily on Tehran's foreign policy trajectory in the months ahead, the implications of which are considered in this month's Iran Case File (ICF).

On the domestic front, the statement issued by the Reformist Front stood out as one of the month's most significant events, reigniting longstanding disputes among Iran's political factions. Sweeping proposals for structural reform, calling for both a political and economic overhaul to address the country's deepening internal challenges and persistent external standoffs, were put forward.

What made the statement particularly notable was its bold recommendation to halt all uranium enrichment activities and allow full monitoring of Iran's nuclear program by the International Atomic Energy Agency (IAEA). In addition, the Reformist Front openly advocated for direct negotiations with the United States in an effort to strike a comprehensive settlement with Western powers and bring years of confrontation to an end.

The proposal was received with alarm in "conservative" and "hardliner" circles, which denounced it as an act of capitulation. Critics argued that such measures would erode Iran's strategic leverage, portraying them as serving Israeli and US interests and undermining the very foundation of the Iranian republic's resistance doctrine.

Economically, August 2025 marked a turning point for Iran as the activation

of the snapback mechanism by France, the UK and Germany sent a stark warning to Tehran. Unless a nuclear agreement is reached within weeks, Iran faces the reimposition of UN sanctions that were lifted a decade ago. These sanctions would target core sectors — oil exports, technology transfers, spare parts, banking and finance and even freeze state assets abroad — effectively paralyzing the already besieged Iranian economy.

Official forecasts paint a bleak picture: inflation is projected to surpass 90%, economic growth is expected to contract by -3% and the national currency's value could slide to 165,000 tomans to the dollar, compared to 105,000 tomans today. Such outcomes would dramatically worsen living standards and risk social unrest.

Militarily, Iran has moved to project strength and reassure its public of its readiness through the Iqtidar 1404 war games in the Gulf of Oman and the northern Indian Ocean. The drills showcase Iran's military continuity, aim to plug gaps exposed during the 12-day war and send a message to both domestic and foreign audiences that the armed forces are prepared for renewed conflict if necessary.

These displays of power also come amid renewed tensions with neighbors — particularly Azerbaijan, which Tehran accuses of aiding Israeli military operations against it during the 12-day war. Iranian officials further warn that Gulf waters could be exploited as a staging ground for future attacks, highlighting how external frictions are now interwoven with Tehran's domestic imperative to demonstrate resilience.

Socially, the activation of the snapback mechanism — and the looming return of UN sanctions — is set to deepen Iran's economic blight and strain living

standards. This raises the risk of renewed waves of public anger and street protests, a scenario the establishment seeks to prevent amid regional threats and what it views as Israeli attempts to stoke internal unrest as a prelude to toppling the Iranian republic.

Ideologically, the establishment has been engaged in a comprehensive effort to reassert itself and rebuild its legitimacy following the reputational damage sustained during the war with Israel. Supreme Leader Ali Khamenei, who remained notably absent during the war to avoid Israeli targeting, has since sought to reestablish his image. Clerics and religious figures have taken to addressing virtually every matter of public concern, urging Iranians to rally behind the supreme leader and reaffirming his role as the nation's spiritual and political compass.

In response to internal narratives framing the war as a defeat, clerics have advanced two counter-narratives: first, that the war was a great victory, and second, that it should be understood through the lens of the Treaty of Hudaybiyyah — perceived as a setback at the time, but ultimately a turning point leading to eventual triumph. This framing is designed to engender unconditional trust in the supreme leader's decisions.

Yet tensions within the clerical establishment remain visible. The resignation — or dismissal — of Kazem Sedighi as Tehran's Friday prayer leader, following accusations of corruption and misappropriation of seminary funds and land, illustrates a widening gap between the values preached by clerics and their actions. This gap continues to erode public trust, creating ideological vulnerabilities at a time when the establishment can least afford them.

Regionally, Iran's relations with the Arab world remain turbulent and deeply entangled in local crises. In Iraq, the government's sudden withdrawal of the draft law to restructure the Popular Mobilization Forces (PMF) sparked debate over whether this move signals the shelving of the law altogether or a temporary tactical freeze, awaiting more favorable regional conditions. The proposed legislation would have far-reaching implications: it envisions the PMF as a parallel force to the regular army, grants it sweeping powers, grants it a foothold in the shadow economy similar to Iran's Islamic Revolutionary Guard Corps (IRGC) and elevates the PMF's leadership to the ministerial level, placing it on equal footing with the minister of defense rather than subordinate to him. Such provisions have divided Iraq's political class, with Shiite factions themselves split, Sunnis and Kurds united in opposition and Washington quietly pressuring Baghdad to curtail or dissolve the PMF's influence. As a result, the fate of the draft law is not merely a domestic legislative matter but is directly influenced by wider regional tensions and power plays.

Meanwhile, the Yemeni theater witnessed a dramatic escalation. Israel, in a significant shift in its rules of engagement, carried out a targeted strike that killed the prime minister of the Houthi government along with nine senior ministers — a move that surpasses previous strikes, which were largely confined to military and civilian infrastructure. The operation exposed major vulnerabilities in Houthi security and intelligence capabilities, underscoring Israel's ability to infiltrate Sanaa's defenses and strike deep into the group's leadership.

Internationally, Iran's relations with the United States are in one of their most tense phases since the war launched by Washington and Tel Aviv against Tehran. The post-war environment has been marked by a renewed wave of sanctions targeting key sectors of the Iranian economy, part of a calculated strategy aimed at forcing the establishment back to the negotiating table after talks were suspended on the eve of the conflict. The pressure campaign is not merely economic but also psychological, designed to keep Iran off balance and deprive it of time to consolidate its internal front.

Europe, for its part, has assumed a central role in determining the fate of the nuclear file following the destruction of several Iranian nuclear sites by Israeli and US strikes. European powers have moved beyond rhetoric, threatening to reimpose international sanctions by formally activating the snapback mechanism. This escalation puts Iranian diplomacy under unprecedented strain as Iranian officials are confronted with the challenge of negotiating under duress while facing the very real risk of further attacks by the United States and Israel.

These external pressures are magnified by the growing risk of domestic upheaval, as renewed sanctions are likely to exacerbate economic hardship and fuel discontent within Iranian society. In this context, Tehran's engagement with the IAEA remains its most viable option. By cooperating with the IAEA, Iran could buy crucial time, lower the temperature of the crisis and perhaps secure a face-saving compromise that mitigates the twin threats of international escalation and internal instability.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

Iran's domestic scene in August 2025 was marked by renewed debates over sweeping reforms, exposing rifts among the political elite. The activation of the snapback mechanism loomed large, threatening to deepen Iran's economic strain. Authorities tried to rally public morale amid rising tensions with neighboring states, but social frustration continued to simmer, pointing to growing pressure on the establishment. Alongside these challenges, a renewed wave of religious discourse followed the recent conflict, aimed at reasserting the establishment's legitimacy and reinforcing public loyalty.

Iranians Divided Over Calls for Comprehensive Reforms

In the weeks following the end of the 12-day war, political debate in Iran quickly reignited between the “reformist” and “conservative” camps. The Reform Front issued a statement outlining its vision for the country’s future, calling for sweeping political and economic reforms and urging direct negotiations with the United States over the nuclear program — which it described as the only viable path to saving Iran from its current crises. This statement sparked a fierce backlash from “hardliners,” who condemned it as an act of surrender and branded it divisive and disgraceful. In contrast, “reformists” and their supporters defended the statement as an honest and necessary proposal, framing it as the most realistic path to overcome the nation’s mounting challenges. This file explores these developments under two key headings: the “reformists” proposed roadmap and domestic responses to their statement.

The “Reformist” Roadmap

During the 12-day war, Iran sustained severe losses on multiple fronts. Heavy casualties were reported among military personnel, including senior commanders in both the regular army and the Islamic Revolutionary Guard Corps (IRGC). In addition, around 15 nuclear scientists were assassinated, and hundreds of civilians were killed. The country’s nuclear and missile infrastructure suffered extensive damage, compounding the economic strain already caused by US sanctions, inflation and widespread shortages of water and electricity. Faced with these setbacks and mounting public discontent, the Iranian Reformist Front unveiled a bold plan for national salvation, arguing that only radical change could ensure the establishment’s survival. Its statement laid out several key proposals, which are summarized below.⁽¹⁾

- Halting uranium enrichment and accepting full International Atomic Energy Agency (IAEA) monitoring of Iran’s nuclear program, in exchange for lifting international sanctions, normalizing relations with the United States and rebuilding the country. The statement specifically warned against the E3’s threats to activate the snapback mechanism, describing it as both possible and dangerous.

- Reforming foreign policy by pursuing reconciliation among Iranians at home and abroad, and deepening cooperation with regional states to promote peace — including engagement with Saudi Arabia and support for efforts to establish a Palestinian state.

- Ending political repression, releasing all political prisoners and reorienting official rhetoric to focus on citizens’ interests and well-being rather than ideological battles and external confrontations.

- Demilitarizing politics by calling for the military’s return to the barracks and its withdrawal from political, economic and cultural life. The statement was widely interpreted as a direct critique of IRGC, accusing it of overstepping its mandate and encroaching on the authority of civilian institutions.

- Media and cultural reforms, including restructuring the state-run Islamic Republic of Iran Broadcasting, abolishing censorship and broadening freedom of expression.

- Constitutional amendments for women’s rights, aimed at ending structural discrimination and halting state violence against women.

- Economic liberalization, reducing unnecessary state interference, creating equal economic opportunities for all and building a welcoming environment for domestic and foreign investment.

The statement outlined three strategic options for the country's future: (a) maintain the status quo with an uncertain truce following the war with Israel, (b) continue the pattern of tactical negotiations that buy time but fail to resolve core crises or (c) accelerate efforts to end hostilities at home and abroad, overhaul governance structures, restore popular sovereignty and abandon the policy of perpetual escalation and international isolation.

Coinciding with the release of this statement, former President Hassan Rouhani publicly urged the Iranian leadership to lower tensions with Washington, which he described as “a duty, not an option.” Rouhani called for the adoption of a new national strategy that would reflect the will of the Iranian people, prioritize development and strengthen national unity. He cautioned against relying on slogans or rhetoric in place of practical reforms, arguing that the recent war had exposed deep structural weaknesses that must be addressed. Rouhani also pressed for the country's armed forces and intelligence services to return to their core missions, stepping back from involvement in economic activity, propaganda efforts and direct political influence. Echoing this sentiment, former Foreign Minister Mohammad Javad Zarif sent messages to the establishment through *Foreign Policy* magazine, arguing that Iran's future stability depends on a “bold diplomatic initiative.” He urged a shift from a threat-based foreign policy to one centered on opportunities, calling for broader international engagement, the creation of new partnerships and the resumption of dialogue with both Europe and the United States.⁽²⁾

In parallel with Rouhani and Zarif's calls, former Parliament Speaker Mehdi

Karroubi issued a stark warning about the country's trajectory. He argued that the establishment's pursuit of nuclear energy — once touted as a means to elevate the Iranian people — had instead dragged them “to the bottom of the abyss.” Karroubi urged officials to reconnect with the public and lay the groundwork for structural reforms based on the will of the nation, stressing that such action was essential if Iran was to survive “before it's too late.”⁽³⁾

Domestic Reactions to the “Reformists” Statement

The Reformist Front's statement sparked wide-ranging — and at times sharp — pushback from “conservative” circles. Hossein Shariatmadari, editor-in-chief of *Kayhan* newspaper, accused the Reformist Front of acting as Israel's “fifth column.” He argued that such a role meant “working from within on behalf of the enemy and seeking to steer public opinion through arguments that appear sympathetic.”⁽⁴⁾

Chief Justice Gholam Hossein Mohseni Eje'i condemned the Reformist Front's statement as a “disgraceful act” driven by personal motives. He announced that the Tehran Public Prosecutor's Office had opened legal proceedings against the signatories and insisted that they must issue a public apology for what he called their misguided stance.⁽⁵⁾

Critics went further, arguing that the statement — along with remarks by “moderate” figures — though seemingly framed as defending public interests, ultimately aimed to weaken Iran's independence, erode its regional strategic depth and dilute its revolutionary identity. They claimed that the timing of the statement, coinciding with Rouhani and Zarif's calls, reflected a coordinated internal front against the establishment's core princi-

ples, effectively aligning with external efforts to destabilize the country.⁽⁶⁾

Some “hardliner” commentators argue that the “reformists” are effectively calling for a peaceful transfer of power, pursuing a form of change from within the system itself. In their view, this amounts to an attempt to bring down the establishment through soft means — preserving its formal structure but stripping it of its tools of resistance, its missile arsenal and its nuclear program.⁽⁷⁾

Even within “reformist” circles, some parties adopted cautious or critical positions toward the statement. Mohammad Quchani, head of the Political Committee of the Executives of Construction Party, called the statement a miscalculation by “reformists” and a “premature move that threatens national cohesion.” He warned that the statement could have three major consequences: weakening Pezeshkian’s government in international negotiations, emboldening extreme “hardliner” factions seeking to pressure the establishment and undermining the fragile sense of national unity that had emerged after the recent Israeli assault.⁽⁸⁾

Despite “hardliner” claims that the Reformist Front’s statement signaled a withdrawal of support for Pezeshkian’s government, the administration’s reaction suggested tacit approval. Government spokeswoman Fatemeh Mohajerani said it was “natural for any political front or party to express its views,” describing such debate as a sign of a healthy and dynamic society.⁽⁹⁾

Conclusion

The need for change within the Iranian establishment has become both urgent and unavoidable, a reality acknowledged by “reformists” and “conservatives” alike, given the internal and external threats to

the system’s survival. Yet many observers argue that the timing of the Reformist Front’s statement was poorly chosen, coming as the country struggles to recover from the devastating fallout of the 12-day war. There are fears that the Iranian public might embrace the demands set out in the statement, potentially giving rise to an organized internal opposition that could ignite fresh protests — and perhaps even a revolution capable of toppling the establishment.

Reactivating the Snapback Mechanism and Its Potential Impact on the Iranian Economy

On August 28, 2025, the foreign ministers of the UK, France and Germany formally notified the UN Security Council that they were activating the snapback mechanism against Iran, accusing Tehran of breaching its nuclear obligations. This decision marks a major turning point, as it sets in motion a legal process that could reinstate UN sanctions that were suspended following the 2015 nuclear deal. Iran now has 30 days to resolve the dispute or face a return to some of the most punishing multilateral sanctions ever imposed on its economy — sanctions potentially even harsher than the unilateral measures currently enforced by Washington.

What Is the Snapback Mechanism?

The snapback mechanism, enshrined in the Joint Comprehensive Plan of Action (JCPOA) signed between Iran and the P5+1 (China, Russia, the United States, the UK, France and Germany), was designed as a safeguard to ensure Tehran’s compliance with its nuclear commitments. It grants any party to the deal the unilateral right to trigger the reimposition of UN sanctions if it believes Iran is in breach, bypassing the need for a new Security Council vote and effectively preventing any veto power from halting the process. In other words, once the mechanism is invoked, the return of sanctions is auto-

matic unless the issue is resolved within the designated 30-day window.

Should this process run its full course, Iran would effectively find itself back in the pre-JCPOA sanctions regime, reminiscent of the 2006–2010 period when a combination of UN, US and EU measures severely restricted its economy and financial networks. Those years were among the most painful for Tehran, leading to diplomatic isolation, a collapse in oil exports and deep structural strain on its economy. The current activation of the mechanism threatens to plunge Iran into an even more challenging scenario, given that its economy is suffering from eight years of instability following Washington's withdrawal from the JCPOA in 2018. Inflation is already at crisis levels, the currency continues to depreciate and critical sectors such as technology, banking and energy face mounting pressure.

This latest move by Europe not only raises the stakes for Iran's nuclear diplomacy but also creates a severe test for its political leadership. The country's negotiators now face the daunting task of either making concessions to defuse the crisis or bracing for another round of comprehensive sanctions that could deepen domestic discontent and further strain Iran's regional posture.

If the 30-day deadline passes without reaching an agreement on the outstanding issues of the nuclear deal, UN sanctions will be automatically reimposed on Iran under six Security Council resolutions issued between 2006 and 2010: Resolutions 1696, 1737, 1747, 1803, 1929 and 2224. The aforesaid resolutions encompass wide-ranging economic and security restrictions that would once again isolate Iran from the global economy. These restrictions include the following:

- Prohibiting foreign investment in Iran's oil and gas sectors, cutting off a key source of funding and technological expertise for Tehran's energy industry.

- Prohibiting the transfer of sensitive and dual-use technologies, covering a wide range of industrial components, electronic devices, precision instruments and specialized software.

- Freezing the assets of Iranian individuals, entities, financial institutions and companies, alongside imposing travel bans.

- Imposing banking and financial restrictions on Iranian banks' dealings with the global financial system, including bans on opening branches abroad, curbs on services to the Central Bank of Iran and heightened scrutiny of Iran-related transactions.

- Authorizing countries to inspect cargo from Iranian companies — such as Iran Air and the Islamic Republic of Iran Shipping Lines — to seize sanctioned goods.

- Imposing a ban on arms exports, restricting Iran's missile programs and prohibiting the transfer of related technologies.

The Economic Implications of Reactivating the Snapback Mechanism

Reimposing previous UN sanctions would plunge Iran back into the difficult economic era it experienced over a decade ago during Mahmoud Ahmadinejad's presidency. At that time, the sanctions triggered severe economic problems — shrinking GDP, soaring unemployment, inflation surpassing 35% and a dramatic currency devaluation. However, Iran was then in a comparatively stronger position, with over \$120 billion in foreign currency reserves and buoyed by high global oil prices, factors that helped the economy absorb some of the shock.

Today, the situation is markedly worse. Oil prices are lower, Iran's foreign reserves have been depleted and much of what remains is frozen abroad. Macroeconomic indicators show a much deeper structural deterioration than in the Ahmadinejad era.

Mehdi Pazouki, an economics professor at Allameh Tabatabai University,⁽¹⁰⁾ warned that if the snapback mechanism is activated, "we will be considered a threat to global security, and all UN member states will create problems for us." He stressed that this would effectively reinstate Security Council resolutions that Ahmadinejad's "hardliners" once dismissed as mere "pieces of paper," a move that would severely damage Iran's already fragile economic indicators.

Should Iran fail to reach a nuclear agreement before the deadline, the reimposition of UN sanctions would immediately strain the national budget, oil revenues and foreign currency inflows, while disrupting production and overall economic growth. Signs of impact are already visible: the currency has depreciated sharply, with the US dollar surpassing 100,000 tomans, gold prices have surged in local markets and financial markets remain highly volatile, highlighting Iran's acute vulnerability to external pressures.

The sanctions, if enacted, will also severely undermine the industrial, medical and scientific sectors. Restrictions on the transfer of sensitive technologies and dual-use equipment will block Iran from developing, importing, modernizing or maintaining much of its infrastructure. Critical items such as laboratory instruments, industrial imaging devices, frequency converters, guidance systems, specialized alloy components, microchips, physics and dynamics simulation software, radiotherapy apparatus and

radiopharmaceutical production equipment will be sanctioned.

Even medicine imports will face challenges due to banking and transport restrictions, while Iranian researchers will lose access to global computing resources and knowledge platforms, further isolating the country from the international scientific community.

Confirming the potential severity of these sanctions, a report from the Iranian Chamber of Commerce projects a sharp deterioration in key macroeconomic indicators if they are implemented. Under the most likely scenario, Iran could face severe stagflation, with inflation climbing to 75%, economic growth contracting by -1% and the exchange rate rising to 135,000 tomans. In a worst-case scenario, conditions could worsen further: inflation might exceed 90%, growth could fall to -3% and the currency could weaken to 165,000 tomans, underscoring the dramatic strain on the Iranian economy.⁽¹¹⁾

Conclusion

Iran is already grappling with multiple economic and social crises, and official projections from the Iranian Chamber of Commerce suggest that renewed sanctions would severely undermine all major macroeconomic indicators. Analysts warn that the potential impact could be far more damaging than the challenges Iran faced a decade ago, with serious repercussions likely to extend beyond the economy, affecting internal security and the overall stability of the establishment.

Iran's Attempts to Boost Morale Amid Mounting Disputes With Neighbors

Still grappling with the consequences of the 12-day war, Iran has been assessing the military and strategic losses it sustained during the conflict. In August 2025, the Iranian military sought to re-

store morale through a conventional naval exercise, Iqtidar 1404, designed to enhance coordination and interoperability among its naval units. At the same time, Tehran has accused Baku of facilitating Israeli drone strikes in June 2025, while the Gulf Cooperation Council (GCC) countries have pressed Iran to relinquish control of islands claimed by the UAE. Tehran views both Baku and Abu Dhabi as key supporters of Tel Aviv on Iran's borders, a perception that heightens regional tensions. This file details the naval maneuvers conducted by Iran in the Sea of Oman and the northern Indian Ocean, while also highlighting the ongoing strain in Tehran's relations with its neighbors.

Naval Drills to Repair Crushed Morale

On August 21, 2025, the Iranian navy commenced the Iqtidar 1404 exercise in the Gulf of Oman and the northern Indian Ocean. The drills featured the Sabalan destroyer and the Gnaveh cruise missile launcher, which fired Nasser and Qader anti-ship missiles. Iranian media reported that the Qader missile is a medium-range system capable of flying at very low altitudes over the sea with an estimated range of around 300 kilometers, while the Nasser missile can strike targets up to 90 kilometers away.⁽¹²⁾ Tehran claims these missiles rival Western and Chinese naval systems in precision, maneuverability and stealth.

The Iranian navy, estimated to number around 18,000 personnel, largely survived the recent war with Israel and the United States, and Admiral Shahram Irani, its commander, said the recent exercises aimed to test combat readiness under realistic conditions. The maneuvers included counter-electronic warfare, drone reconnaissance, submarine tracking and electronic disruption operations. To accommodate the drills, Iran temporarily closed airspace from midnight to 6 a.m., covering western regions including

Zanjan, Hamedan, Arak and Yasuj as well as the western Arabian Gulf, where missile and drone launches were conducted throughout the exercise area.

Iran's efforts to restore domestic morale face mounting pressure amid a series of espionage revelations. Authorities have uncovered networks of agents allegedly working for Israel within the military, government institutions, and wider society. In response, the Iranian judiciary recently executed several individuals accused of spying in cities including Mashhad, Isfahan and Karaj, with reports suggesting that the total number of executions could eventually surpass 100.⁽¹³⁾

The Islamic Revolutionary Guard Corps (IRGC) also detained additional suspects in Mashhad and Isfahan, though officials have withheld names, evidence and further details regarding these arrests. Among the most high-profile cases was the execution of nuclear scientist Roozbeh Wadi in July, following 18 months of imprisonment.⁽¹⁴⁾ Analysts view this case as indicative of the depth of Israeli infiltration within Iran, demonstrating that even critical sectors such as the nuclear program are not immune to espionage.

Continued Tensions With Neighbors

Tensions between Iran and its northern neighbor, Azerbaijan, have intensified in recent years amid accusations of security and military cooperation with Israel. Tehran alleges that Baku is enabling Israel to expand its influence along Iran's northern border, effectively serving as a "forward base" for Israeli operations. Azerbaijan, however, maintains that its growing ties with Israel are standard international relations and firmly rejects Tehran's claims that it permits Israeli strikes targeting Iran from its territory.

In a particularly controversial statement, Ebrahim Azizi, head of Iran's Parliamentary Security Committee, claimed that Iranian border guards observed Israeli drones entering Iranian airspace from Azerbaijan in June 2025. Azizi added that Iran formally notified Baku of the drone incursions, signaling a deepening diplomatic rift between the two countries over security and surveillance issues along their shared border.⁽¹⁵⁾

Azerbaijan has consistently denied Iranian claims that its territory was used by Israel to launch attacks on Iran during the 12-day war in mid-June 2025, demanding proof to substantiate such allegations. Azizi responded by asserting, "Whether or not documentation is provided is a separate debate, but this fact cannot be denied."

Meanwhile, tensions between Iran and its southern neighbors also escalated. The GCC officially called on Iran to withdraw from the three Emirati islands in the Arabian Gulf that Tehran has occupied since Britain's withdrawal in 1971. The GCC emphasized that these islands are an inseparable part of the UAE's sovereign territory, highlighting the continuing diplomatic friction between Iran and the Gulf states.

The three islands — Greater Tunb, Lesser Tunb and Abu Musa — have remained a point of contention since Britain withdrew from the region in 1971, when the last Shah of Iran Mohammad Reza Pahlavi dispatched Iranian forces to assert control over them. In recent years, Iran has implemented a series of security and administrative measures on the islands, periodically reinforcing its military presence. Tehran now maintains missile systems, drones and intelligence surveillance infrastructure there.

Following the 165th Ministerial Council session held in Kuwait, the GCC issued a statement declaring that "any decisions, practices, or measures taken by Iran regarding the three islands are null and void and do not change the historical and legal facts that affirm the UAE's right to sovereignty." The GCC urged Iran to engage in peaceful resolution efforts, either through direct negotiations or by referring the dispute to the International Court of Justice,⁽¹⁶⁾ signaling the GCC's commitment to resolving regional conflicts via international law and diplomacy.

Conclusion

The Iranian armed forces are confronting a complex dilemma, exacerbated by the deep infiltration of agents and spies, the damage inflicted on critical arms and missile infrastructure during the recent conflict with Israel and deficiencies in effective air defense systems. The naval exercises, while aimed at projecting control and demonstrating military capability as well as boosting morale after the war, remained limited in scope. They involved a small number of older, modified vessels, constrained firepower and lacked advanced early warning systems. Meanwhile, ongoing tensions with neighboring states risk igniting broader crises if Tehran fails to pursue solutions acceptable to all parties involved.

Iran Between the Reactivation of the Snapback Mechanism and Escalating Public Discontent

Iranian media outlets have drawn attention to the joint statement by the E3 (France, Germany and the UK) announcing the activation of the mechanism to reimpose sanctions on Iran. This development is expected to place heavy pressure on Iranian society and could spark a social explosion threatening the coun-

try's security and stability. The establishment will need to act swiftly, adopting measures and policies to absorb public anger and discontent while safeguarding national unity and cohesion. This file examines two key themes: the social repercussions of the reimposition of sanctions and the establishment's management of the resulting crisis.

Potential Social Consequences of Snapback Sanctions

The joint statement issued by the E3 — members of the Joint Comprehensive Plan of Action (JCPOA) — announced the activation of the snapback mechanism to reimpose sanctions on Iran. The move was justified on the grounds that Iran had failed to meet its obligations under the nuclear deal and had violated its terms.⁽¹⁷⁾ The announcement dealt a heavy blow to Iranian society, which is still reeling from the aftermath of the 12-day war that left behind deep economic, political, social and health crises. The renewed sanctions are expected to aggravate the country's economic woes and could even push it toward default, given the sharp currency fluctuations and continued deterioration of trade and investment sectors. As a result, production capacity may keep shrinking,⁽¹⁸⁾ unemployment and poverty rates are likely to rise and living standards will decline further. Prices and inflation may also continue to climb, as happened after the Israeli-US strikes on Iran, when inflation exceeded 41%.⁽¹⁹⁾

These economic pressures will likely deepen numerous social and psychological crises, including rising divorce rates, a growing reluctance to marry or have children, increased drug addiction and violence, the spread of crime and corruption at both the community and governmental levels, accelerated emigration and brain drain, a weakening education system, higher illiteracy rates and growing numbers of students leaving school to

earn a living. The health sector may face a surge in deaths and suicides, worsening shortages of medicines, declining quality of medical services and the emigration of doctors, all of which will harm public health — especially for those with chronic or serious illnesses.

Collectively, these effects pose a significant threat to national security. The sanctions are also likely to deepen internal rifts between supporters and opponents of the establishment. Many Iranians blame the supreme leader and the state's repressive policies as the root cause of the crises and pressures they endure, arguing that the only solution lies in ending the leadership's dominance, dismantling the revolutionary power structure⁽²⁰⁾ and establishing an alternative political system. This sentiment could fuel continued protests and uprisings, reminiscent of the 2022 demonstrations that rallied under the slogan "Woman, Life, Freedom" following the killing of Mahsa Amini. These protests demand reform of the system and laws, as well as human rights, freedom, dignity, peace and sustainable development. In response, the establishment may intensify repression, increase penalties, arbitrary arrests and even summary executions.

The Establishment's Response to the Looming Possibility of Renewed Sanctions

Iranian Foreign Minister Abbas Araghchi described the sanctions imposed by the United States and its allies as a crime against humanity. He stressed that, although sanctions are a bloodless alternative to war, they can still be deadly, with children and the elderly making up the majority of their victims.⁽²¹⁾ In the absence of a comprehensive anti-sanctions law — one that would protect affected citizens and institutions, provide legal and

economic support, criminalize domestic compliance with sanctions, strengthen diplomatic and international tools, establish compensation mechanisms and safeguard national interests — there is an urgent need to unify and coordinate efforts across all sectors to draft legislation aimed at confronting sanctions or at least mitigating their severity and impact on Iranian society. In response, the Pezeshkian government submitted a 23-point anti-sanctions bill to Parliament. The bill was approved and ratified by the Council of Ministers on December 18, 2024, but remains under review by the Parliament's National Security and Foreign Policy Committee.⁽²²⁾ In light of the current pressure on the establishment and the looming threat of renewed UN sanctions, Tehran may now move to activate this bill and develop policies to prevent a resurgence of public protests — particularly amid growing despair, frustration and public anger over the repeated cycles of sanctions that citizens have endured for years.

Conclusion

The 12-day war yielded an unexpected result: a surge in social cohesion and support for the establishment in rejecting and resisting aggression against Iran. However, the reimposition of UN sanctions will add further strain to a society already burdened by years of US sanctions. This makes renewed protests likely as the economic situation worsens.

To avoid being overwhelmed by these challenges — which could threaten the establishment's survival or plunge the country into cycles of violence, revolution and unrest — the authorities may turn to additional measures and policies aimed at softening the impact of sanctions on society. The only viable way out of this crisis lies in shifting focus inward rather than pursuing destabilizing projects abroad, easing tensions with neighboring countries to break regional and

international isolation, reaching a mutually acceptable resolution on the nuclear issue and directing national resources toward sustainable development projects that ensure security and a dignified life for Iranians at home.

Iran's Heightened Religious Discourse in the Aftermath of Israeli-US Strikes

There is a notable intensification of religious discourse in Iran, with state-affiliated seminary jurists (hawza clerics) increasingly expressing their views on a wide range of political, religious, social and economic issues. These include the Israel-Iran war, the nuclear negotiations and matters extending beyond Iran, such as the potential disarmament of Hezbollah in Lebanon and the role of the Popular Mobilization Forces (PMF) in Iraq. This active engagement serves to reinforce the establishment's legitimacy and bolster confidence in the supreme leader. Ironically, this surge in religious commentary occurred shortly after Ayatollah Kazem Sedighi stepped down from his role as Tehran's Friday prayer leader amid corruption allegations. This file analyzes the reasons for this intensified religious rhetoric and assesses its broader implications.

Enhancing the Establishment's Power and the Supreme Leader's Legitimacy

The supreme leader largely remained absent from major public events, appearing only briefly and rarely following assassination threats from Israeli and US officials in June 2025. At the end of July 2025, the Israeli Defense Minister reiterated his threat to Khamenei, "If you continue to threaten Israel, our long arm will reach Tehran again with greater force, and this time against you personally."⁽²³⁾ This threat was reflected in Khamenei's limited public presence. For the first time in at least 15 years, he did not attend the Arbaeen commemorations at the Supreme Leader's House. In this post-war context,

the establishment intensified religious discourse, increased the visibility of clerics and sought to reposition Khamenei within the pre-war public sphere — both domestically and internationally — addressing the broader Shiite community.

Within Iran, clerics have framed the conflict in exalted historical and religious terms, portraying Iran as powerful and casting the enemy as defeated. They have drawn analogies to early Islamic events, such as the Treaty of Hudaibiyyah, the Treaty of Imam Hassan with Muawiyah and the Battle of Hussain, linking Iran's present struggles to the formative battles of Islam. The supreme leader is compared to figures like Prophet Muhammad, Ali Ibn Abi Talib, Hussain and Hasan in terms of leadership and strategic decisions.

Friday prayer preacher Mohammad Hassan Abu Torabi referred to “the surrender of the Israelis to the Iranian people” and praised the supreme leader's strategy of promoting knowledge, rationality and religion as “keys to strengthening our power.” He also warned against any discourse that undermines the state's prestige, emphasizing that protecting this is a priority of the supreme leader, “Writers and intellectuals must beware of any discourse that undermines the state's prestige, and the supreme leader emphasizes and insists on protecting this power.”⁽²⁴⁾ The Friday prayer preacher in Karaj similarly emphasized that “the Iranian people reject negotiations with the Americans” and claimed that the people are united around the leadership.⁽²⁵⁾ He reinforced the historical analogy, saying: “Just as the Treaty of Hudaibiyyah was, on the surface, a retreat, but God described it as a clear victory, so too was the Treaty of Imam Hasan a movement to preserve the origins of the Shiite faith from extinction.”⁽²⁶⁾

Regarding Iran's external environment, Iranian clerics have intensified religious discourse to uphold Khamenei's image as the leader of Shiites worldwide, not just in Iran. This outreach includes topics such as uranium enrichment. In his Friday sermon, Habibollah Shabani Movathaki, the Friday preacher in Hamedan, cited the supreme leader's fatwa and political consensus on the legal legitimacy of uranium enrichment, “Enrichment is an inherent right of Iran, and we have not overstepped our bounds.”⁽²⁷⁾ This message serves a dual purpose: internally, it reinforces the establishment's legitimacy and strengthens traditionalist bases; externally, it reaches the global Shiite community, particularly followers of the supreme leader abroad, who were affected by the war on Tehran and the weakening of the supreme leader's authority. Clerics aim to consolidate these communities, viewing them as key ideological bases that focus more on jurists and clerics than politicians.

In the same vein, Reza al-Arafi, the Friday prayer leader in Qom, warned the Lebanese government against disarming Hezbollah, “Hezbollah is the one that liberated Lebanon, and if you take away these weapons, Lebanon will also suffer the same fate as Syria and Libya.”⁽²⁸⁾ A similar statement was made by the Friday prayer leader in Arak regarding the weapons of the PMF, saying, “The Iraqi people must not allow the enemy to disarm the PMF. Without the PMF, ISIS would have occupied Iraq.”⁽²⁹⁾

These statements form part of extensive messaging from clerics in Tehran, Qom, and across Iranian mosques on events outside Iran. They are primarily directed at Shiite communities abroad — followers of Khamenei and believers in the Wilayat al-Faqih (Guardianship of the Jurist). Their

purpose is to reinforce these communities, convey that Iran remains aligned with them and affirm that the supreme leader remains strong, controlling the tasks of his “Guardianship” both domestically and internationally.

Sedighi Steps Down as Tehran Friday Prayer Leader

Tehran’s Friday prayer leader, Ayatollah Sedighi, submitted a letter to Khamenei requesting his resignation from leading Friday prayers in Tehran, which Khamenei approved. In his letter, Sedighi thanked the supreme leader for appointing him as interim Friday prayer leader over the past 17 years and explained that his resignation was motivated by a desire to focus on his scholarly, teaching, and religious preaching activities.⁽³⁰⁾

The irony of Sedighi’s resignation lies in the fact that both political and judicial authorities overlooked the underlying corruption issues. He cited only his wish to dedicate time to teaching and preaching,⁽³¹⁾ without mentioning potentially facing accountability from executive or judicial bodies. Public pressure appears to have prompted the authorities to allow a face-saving resignation while protecting the reputation of the religious establishment amid financial and administrative corruption allegations. Sedighi was known as a hawkish, “conservative” radical within the establishment, frequently accusing opponents of working for foreign enemies, hypocrisy and other offenses.

Observers note that the official explanation for his resignation — focusing on scholarly and preaching activities — was disingenuous, as Friday prayers typically include a sermon. The institutions responsible for overseeing Friday prayer leaders did not address either his dismissal or the corruption allegations, particularly the Ozgol land scandal: a plot in northeast Teh-

ran owned by the hawza was transferred in 2022 to a company linked to Sedighi’s sons. Despite this, Sedighi continued delivering sermons emphasizing “piety,” “asceticism” and “devoutness,” framing criticisms against him as attacks on religion and ritual.

His hawza career was controversial. He clashed with Mesbah Yazdi before the latter’s death and had his candidacy for the Assembly of Experts rejected in the fourth and fifth sessions due to failing the *ijtihad* test, despite his status as Tehran’s Friday prayer imam and his proximity to decision-making circles.⁽³²⁾

Conclusion

Following the recent Israel-Iran war, official religious rhetoric has intensified in Iran to enhance the legitimacy of the establishment and the image of Khamenei. Using its religious institutions and tools, the establishment seeks to rally the public behind the supreme leader and key state bodies. Clerics have commented on virtually every matter — from nuclear negotiations and Israeli aggression to the disarmament of Hezbollah and the PMF — forming a comprehensive strategy to unify Shiite communities, reinforce Khamenei’s authority and portray him as the defender of Shiites and Islam broadly. In some narratives, attacking him is equated with attacking Islam itself, as reflected in the fatwa declaring “enmity against God.”

Simultaneously, Sedighi was relieved of his duties as Tehran’s Friday prayer leader, after he and his family were accused of embezzling funds and grabbing land from religious endowments and hawzas. He has faced neither trial nor political accountability. His removal was handled in a manner that saved face and preserved the reputation of the religious establishment, reflecting the influence of popular pressure, public outcry and the delicate juncture Tehran is facing.

IRAN-ARAB INTERACTIONS

Relations between Tehran and neighboring Arab countries saw notable developments in August 2025. In Iraq, the government's decision to withdraw the draft law institutionalizing the PMF stirred public debate, raising questions about Baghdad's political direction and its ties with Iran. In Yemen, Israeli strikes shook the Iran-backed Houthi group, killing the prime minister and several senior ministers. The assassinations highlighted deep security vulnerabilities within the Houthi leadership and could seriously alter power dynamics in Sana'a in the coming months.

PMF Bill Withdrawn: Delayed or Discarded?

The decision by the Iraqi government, formed by the Iran-backed Coordination Framework, to withdraw the draft law on the Popular Mobilization Forces (PMF) — which aimed to restructure the group and expand its powers — from Parliament has raised several questions: whether the revocation is definitive or indefinite until a more favorable moment emerges? What are its most contentious provisions? What are the objectives and rationale behind the draft bill, which, if enacted, would repeal the old Law No. 40 of 2016? And why did Iran-backed political efforts to pass it ultimately fail?

The Bill and Copying the “IRGC Experiment” in Iraq

The Iran-backed alliances behind the draft law aim to reshape the PMF to mirror the Iranian Revolutionary Guard Corps (IRGC) as a parallel military institution in Iraq, granting it financial, organizational and administrative independence while aligning it with directives from Iran's supreme leader. This would be achieved by giving the PMF broad powers comparable to the Iraqi army and integrating it into the military chain of command. Key provisions of the draft law include:⁽³³⁾

Granting the PMF Parallel Powers

The law allows the PMF to arm itself and acquire advanced technological equipment, creating a unified military apparatus capable of protecting Iraq's democratic and constitutional system, defending the country, safeguarding territorial integrity, combating terrorism and contributing to national security. Essentially, this would establish an Iraqi military entity analogous to Iran's IRGC, aimed at preserving Iranian influence in Iraq.

The PMF's Economic and Institutional Expansion

The bill permits the PMF to recruit and train qualified personnel and to establish a PMF academy as a formal institution, granting a bachelor's degree in military sciences. It also proposes the hosting of the PMF-linked Muhandis General Company to manage construction, engineering and mechanical projects — Iraq's counterpart to the IRGC's Khatam al-Anbiya Construction Headquarters. This ensures independence in expanding the PMF headquarters and increasing its fighter numbers, financed by the state budget, thereby cementing the PMF's infiltration of the national army.

Granting the PMF Leader Ministerial Status

The PMF head would act as the supreme leader of the organization, overseeing all tasks, issuing instructions, internal regulations and decisions, and supervising administrative, technical, financial and organizational affairs. The PMF leader would exercise powers akin to the minister of defense over the PMF's military personnel, including arming, equipping, training and monitoring operations. Senior commanders would require at least 10 years of experience within the PMF. This structure establishes a mechanism for appointments, creation and dismissal, effectively granting the leader ministerial status parallel to the defense minister.

Undertaking Intelligence Tasks

The draft law empowers the PMF to provide information and advice to the government on issues related to Iraq's national security and territorial integrity. This is traditionally one of the core responsibilities of Iraqi intelligence, which is expected to advise authorities based on objective assessments of threats, rather than the ideologically driven perspectives of the PMF, which would naturally

view anyone opposing its agenda as a security threat.

The bill does not set a legal retirement age, meaning that figures such as Faalih al-Fayyadh, senior commanders and thousands of members who have surpassed the military's official retirement age could remain in their positions if the law is enacted. The term "mujahid" is repeatedly used in the bill to describe PMF fighters, emphasizing an ideological dimension. Additionally, the requirement that senior PMF commanders have at least 10 years of service within the PMF ensures that command remains subordinate to the PMF rather than the national military leadership. The United States has also called for the replacement of the PMF leader with an Iraqi figure deemed acceptable.

Reasons for the Government's Withdrawal of the Bill

The Iraqi government withdrew the draft law from Parliament due to a combination of internal divisions and external pressures, as follows:

Shiite Divisions

The most striking feature among Shiite forces is their deep disunity. The Sadrists have long advocated for a state monopoly on weapons, while the Coordination Framework supports a militia-based state. This split has even affected the Coordination Framework itself under heightened US pressure, splintering its forces into three camps: **Pro-law camp:** Led by Badr Organization leader Hadi al-Amiri and Kata'ib Hezbollah leader Abu Hussein al-Hamidawi, this group pushes for passing the law regardless of external pressure or for granting Prime Minister Sudani authority to extend PMF leaders' terms for three to five years until alternative leaders are ready. **Anti-law camp:** Led by Hikma Movement leader Ammar al-Hakim, former Prime Minister Haider

al-Abadi and Sudani, this group opposes the law due to potentially severe external consequences. **Wait-and-see camp:** Led by State of Law Coalition leader Nouri al-Maliki and Asa'ib Ahl al-Haq leader Qais al-Khazali, this faction remains silent, awaiting regional developments and external pressures, but is inclined to replace Fayyadh with close associates to control PMF financial resources. The supreme religious authority in Najaf has consistently demanded a state monopoly on arms.

Sunni-Kurdish Rejection

Sunni and Kurdish blocs have united in absolute opposition to the bill, recognizing that its adoption would consolidate Shiite dominance in Iraq. In protest, they withdrew from the July 2025 parliamentary session when the bill was included on the agenda without prior scheduling,⁽³⁴⁾ leading to fistfights between Sunni and Shiite lawmakers and the cancellation of the session's decisions by Parliament Speaker Mahmoud al-Mashhadani. Sunnis and Kurds view the PMF's growing influence as a threat to national interests, consolidating Shiite control over state institutions for sectarian goals.

US Rejection and Pressure

The US administration publicly opposed the bill, with Secretary of State Marco Rubio warning Sudani on July 22, 2024, that it would strengthen Iran's influence and armed groups that undermine Iraq's sovereignty.⁽³⁵⁾ US officials increasingly compare the PMF to the IRGC, which operates with state funding but functions independently under Iranian guidance.

Meanwhile, US Congress members, led by South Carolina Congressman Joe Wilson, prepared the Free Iraq from Iran Act (H.R. 2658) in April 2025.⁽³⁶⁾ This legislation, part of a broader anti-Iran package including acts targeting Hezbollah, Iran's energy sector and counterterrorism, calls for disbanding militias, ending Iranian

dominance over the Iraqi government⁽³⁷⁾ and dismantling the PMF. Reports indicate that US pressure influenced the Iraqi government to withdraw the bill, including fears of:

- Sudden US troop withdrawal without arrangements or intelligence support on terrorist activity in Iraq.
- Sanctions on influential Iraqi political and military figures and financial institutions.
- Denial of US approval for Sudani's second term before parliamentary elections.
- Disruption of trade cooperation, particularly US investment in Iraq's energy sector amid PMF-linked economic activity.

While Iran remained publicly silent, it played a major role in shaping the draft law as part of restructuring its Iraqi proxies following Israeli strikes. A phone call between the supreme leader's advisor Ali Akbar Velayati and Maliki revealed shared concerns that disarming Hezbollah in Lebanon could presage the disarmament of the PMF in Iraq,⁽³⁸⁾ highlighting Iran and Iraq's coordinated stance to preserve the PMF's military capabilities.

Conclusion

Iran, through its Iraqi proxies, has aimed to strengthen the influence of the PMF via the draft law, capitalizing on its political allies' control over the largest bloc in the current Parliament, which would facilitate the law's approval. This move reflects Iran's concern about potentially losing dominance in the next parliamentary session. By advancing the bill now, Iran may also seek to divert Washington's attention from efforts to dismantle the PMF.

The draft law is currently in abeyance, with the possibility of passing after amendments that accommodate the interests of various parties. Otherwise, a political confrontation could emerge,

potentially delaying parliamentary elections. Consequently, whether the law is ultimately approved or rejected will hinge not merely on parliamentary procedures but on the broader impact of regional developments on Iraq's political landscape.

The Houthi Prime Minister and Nine Ministers Assassinated in Israeli Air Raids

In August 2025, Yemen entered a new and dramatic phase when Israeli warplanes struck a high-level gathering of the Houthi "Government of Change and Construction," killing several top officials, including the prime minister of the unrecognized administration. This operation marked a departure from Israel's previous pattern of strikes, which had focused mainly on Houthi military sites and infrastructure. The incident raises serious questions about how such a security breach could occur, especially given the series of Israeli threats and air raids that preceded the assassination. This file examines the factors behind the Houthis' apparent security lapse, the impact of these strikes on their leadership and operational capacity, and the possible responses by both the Houthis and their Iranian backers.

The Impact of the Israeli Assault on Houthi Political and Military Capabilities

On Thursday, August 28, 2025, Israeli aircraft carried out a precision strike on a gathering of ministers from the Houthi government in Sana'a, killing Prime Minister Ahmed al-Rahawi, nine other ministers and several administrators, while wounding others. The raid was notable for targeting the administrative apparatus of the unrecognized government rather than striking the group's military figures, many of whom are closely tied to Houthi leader Abdul-Malik al-Houthi.

The absence of these influential figures from the meeting immediately sparked speculation. Deputy Prime Minister Mohammed Miftah, a key decision-maker, was not present, nor were Defense Minister Mohammed al-Atifi or Finance Minister Abdul-Jabbar al-Jarmouzi. Even Interior Minister Abdul-Karim al-Houthi, the leader's uncle, sent his deputy, Abdul-Majid al-Murtada, who was killed in the strike.

On the Yemeni street, questions are swirling about why the ministers were instructed to convene in a private house despite repeated Israeli threats and prior airstrikes. Some observers are directly accusing Houthi leaders of security negligence. Others go further, alleging that the security lapse may have been deliberate. These suspicions have been fueled by the timing of the attack, which coincided with a fierce Houthi campaign against the General People's Congress (GPC) party — of which several slain ministers, including the prime minister, were members. This has led to speculation that the Houthis may have exploited the Israeli strike to eliminate rival GPC figures while consolidating their grip on power.⁽³⁹⁾

Despite the audacious nature of the strike, Israeli attacks have so far done little to significantly weaken the Houthis' political or military standing. Instead, the group has leveraged the strikes to consolidate its power: intensifying internal mobilization, tightening its media grip and ramping up political repression. Far from demoralizing their base, these attacks have generated renewed support for the Houthis inside Yemen and among sympathetic circles abroad.

For the Netanyahu government, however, the Sana'a operation was framed as a major intelligence coup — one intended to relieve domestic political pressure by

demonstrating the government's ability to act decisively. Analysts argue that Israel also had external motives, particularly to send a direct message to the "Axis of Resistance" led by Iran, showcasing Tel Aviv's capacity to reach high-value targets even in distant, complex theaters.

Yet, the Houthis remain among the most challenging adversaries for Israeli intelligence. Several factors make them uniquely difficult to penetrate: Yemen's weak communications infrastructure, which complicates electronic surveillance; the country's rugged geography, which provides natural cover; and the Houthis' skillful use of these conditions to evade detection and move discreetly. Additionally, reports suggest that certain international actors provide intelligence to the Houthis, further complicating Israeli efforts to map their networks and neutralize their leadership.

The August strikes also underscored the limitations of Israel's intelligence reach in Yemen. Despite months of monitoring, Israeli forces were still unable to eliminate the Houthis' most influential political, military and financial figures — an outcome that highlights the enduring resilience and security architecture of the group's leadership. Nonetheless, the Netanyahu government quickly capitalized on the strike for political gain, casting it as proof of Israel's unqualified ability to project power far beyond its borders.

This political framing, analysts suggest, was as significant as the tactical outcome. Israeli Defense Minister Israel Katz had publicly stated earlier that Houthi leaders were on Israel's kill list, declaring, "As we said, if the Houthis continue to fire missiles on Israel, they will suffer painful blows, and we will also strike the heads of terror just as we did to Deif and the Sinwars in Gaza, to Nasrallah

in Beirut and Haniyeh in Tehran. We will do it in Hodeidah and Sana'a.”⁽⁴⁰⁾

The Houthi-Iranian Response to Israeli Attacks

In the aftermath of the strikes, Houthi leader Abdul-Malik al-Houthi pledged to escalate retaliation against Israel, declaring that missile and drone attacks would continue “on a steady and rising path.” He asserted that the Israeli operations would not force the group into retreat and promised that “the coming days will witness additional significant achievements in thwarting the Israeli enemy’s attempts to harm our people, our institutions, or our communities.” His remarks were accompanied by a sweeping security crackdown in Sana’a, where Houthi authorities arrested numerous individuals, including 11 UN employees, on charges of espionage and collaboration with Israel. The arrests signal a tightening of internal control and reflect the group’s effort to leverage Israeli aggression to justify expanded repression and further consolidate power.⁽⁴¹⁾

When assessing the Houthis’ military options and their real capacity to threaten Israel, their leverage appears relatively limited compared to Israel’s vastly superior military capabilities and the advanced defensive systems it now employs — bolstered by US support in the Red Sea. Consequently, the Houthis may turn to alternative pressure tools, most likely limited military escalation in the Red Sea and threatening international shipping routes, as a major escalation risks direct confrontation with the international community. Therefore, analysts expect only a calibrated level of escalation, sufficient to absorb domestic anger and project defiance without provoking crippling retaliation. The first Houthi responses following the Israeli strikes reflected this approach, with an attack on the Israeli oil tanker *Scarlet Ray* in the northern Red

Sea, followed by the firing of two missiles at Ben Gurion Airport.

Another key factor shaping the Houthis’ military calculus is the May 2025 Houthi-US agreement, which brought about a cessation of mutual attacks and contributed to a significant reduction in Houthi operations in the Red Sea. This understanding suggests that the Houthis are keen to preserve their standing and influence within Yemen by avoiding actions that could jeopardize the agreement. Consequently, their ability to escalate militarily in response to Israeli strikes — particularly in the Red Sea — appears constrained. The group is also expected to avoid measures that might provoke a major Israeli retaliation, especially since Israeli officials have described the recent assassinations as merely the beginning of a broader campaign. Instead, the Houthis seem focused on maintaining a balance in the Red Sea favorable to their interests, while quietly strengthening their military capabilities and consolidating their internal influence. This approach aligns with Tehran’s strategy of preserving the Houthis as a central pillar of Iranian leverage — not only in Yemen, but across the Red Sea and Bab al-Mandab, where they remain one of Iran’s most valuable pressure cards in its regional power play and negotiations with the West, particularly after Hezbollah’s weakening and the collapse of the Assad regime.⁽⁴²⁾

Conclusion

The Israeli strikes on the Houthi government may cause temporary disruptions in administrative functions, as they targeted key ministers responsible for governance. However, these attacks are unlikely to alter the core power structure of the group or diminish its military and political capabilities. In response, the Houthis are expected to adopt a policy

of tactical de-escalation — effectively weathering the storm — in order to safeguard the political and military advantages they have consolidated inside Yemen. The group will continue to be supported by Iran, which remains committed to providing the group with political cover and military assistance to maintain its value as a strategic ally. Nevertheless, a reduc-

tion in Houthi attacks on Israel does not guarantee immunity from future Israeli action. Given Prime Minister Netanyahu's stated commitment to expanding Israel's campaign against Hamas and its regional allies, it is likely that the Houthis will remain on Israel's target list in the coming period.

IRAN'S RELATIONS WITH INTERNATIONAL POWERS

In accordance with its maximum pressure strategy, Washington imposed further sanctions on Iran across shipping, banking and technology sectors. While these measures tighten the economic noose, analysts doubt they will coerce Tehran into making concessions anytime soon. On the European front, France, the UK and Germany formally triggered the snapback mechanism at the UN Security Council, citing Iran's nuclear violations. Tehran was given a 30-day deadline to resolve the dispute or face reinstated UN sanctions, potentially harsher than unilateral US measures.

Iran's Hard Options Amid Escalating US Sanctions

On July 30, 2025, Washington imposed a new round of sanctions targeting Iran's shipping sector. This was followed on August 8, 2025, by additional sanctions aimed at the banking and technology sectors. Then, on August 21, the United States sanctioned companies based in Hong Kong, China, the UAE and the Marshall Islands for their role in transporting Iranian oil and violating US sanctions. Taken together, these steps suggest that the Trump administration has revived its maximum pressure policy toward Iran. The question now is how this approach should be interpreted at this stage — and what impact it will have on Iran's political, economic and social landscape.

US Sanctions to Pressure Iran

The latest US sanctions come amid heightened tensions following the Israeli-US war on Iran, with the clear goal of compelling Tehran back to the negotiating table over its nuclear program — a threat Washington believes has not been fully or decisively removed. There are still conflicting assessments of the damage inflicted on Iran's nuclear facilities, uncertainty surrounding the fate of its enriched uranium stockpiles and lingering doubts about Tehran's nuclear policy.

In essence, the new sanctions reflect Washington's intent to escalate pressure on Iran, leveraging the country's postwar economic woes to create deeper financial and social strains. The focus is once again on the oil and petrochemical sectors, which generate the revenue Iran relies on to cover basic needs. This approach mirrors the Trump-era maximum pressure campaign that followed the 2018 US withdrawal from the nuclear deal — designed to compel Iran to accept US terms on the nuclear file and other points of contention.⁽⁴³⁾ Table 1 below provides a clear

summary of recently imposed US sanctions on Iran, illustrating the unrelenting pressure on Iran as part of the Trump administration's maximum pressure policy.

A Limited, Short-term Impact

In reality, if the war did not compel Iran to yield to US demands, US sanctions alone are unlikely to do so. Consequently, Iran condemned the sanctions and continued its longstanding policy toward Washington, rooted in hostility and mistrust.

The war may have strengthened the credibility of this approach within Iran, particularly among younger generations who, before the conflict, were largely unconvinced by revolutionary rhetoric but now view the United States as an adversary. Amid this shifting domestic mood, the establishment is likely to continue to resist sanctions without fear of internal opposition. Over the years, Iran has established multiple channels to circumvent sanctions, a point confirmed by Iranian Oil Minister Mohsen Paknejad, who affirmed that the country will not halt oil exports despite any new restrictions imposed under the UN sanctions snapback mechanism.⁽⁴⁴⁾

Furthermore, international sanctions no longer carry the same weight or credibility, particularly given the stance of global powers competing with Washington, such as Russia and China, which are determined to undermine US influence and refuse to comply with its measures. China, in particular, continues to receive the majority of Iran's oil exports through channels that bypass US sanctions.

However, in the long term, the impact of sanctions could be felt again, similar to previous periods, such as before the 2015 nuclear agreement. If Trump's maximum pressure policy is combined with the potential resumption of international sanc-

Table 1: US Sanctions on Iran (August 2025 to July 2025)

Date	Sanctions
July 30	The US imposed sanctions on 20 entities involved in the trade of Iranian oil, petroleum products or petrochemicals, and designated 10 vessels as blocked property. The measures targeted a terminal operator, ship management companies and bulk buyers that collectively facilitated the export and purchase of millions of barrels of Iranian crude oil, petroleum products and petrochemicals.
August 9	Sanctions were imposed on 22 entities connected to a multi-jurisdictional network engaged in illicit oil trade on behalf of the Iranian establishment. This network has employed foreign front companies to transfer funds supporting the Islamic Revolutionary Guard Corps–Quds Force and Tehran’s terrorist operations, activities that undermine international peace and security and advance its ballistic missile program.
August 21	Sanctions were imposed on two China-based companies that operate crude oil and petroleum product terminals and storage facilities, enabling the import of millions of barrels of illicit Iranian oil via multiple US-designated tankers.

Source: Prepared by the Rasanah Institute, based on US Department of State reports

tions following the E3’s decision to activate the snapback mechanism, Iran could face widespread and severe pressure. Its insistence on resistance — and possibly using its nuclear program as a deterrence and bargaining tool — may force Tehran into difficult choices, especially as Washington and Israel have not ruled out a return to military action if Iran continues to evade compliance and buy time, a course of action now easier to pursue than in the past.

Conclusion

Washington has intensified its maximum pressure policy in an effort to compel Iran back to the negotiating table. In the short term, however, US sanctions are unlikely to sway Tehran, as yielding to Trump’s conditions would essentially undermine the establishment’s legitimacy. Over time, though, as pressure and sanctions escalate, the establishment may be compelled to compromise and engage,

particularly given that the option of military action against Iran has become more feasible under the Trump administration.

Iranian Nuclear Diplomacy in the Eye of the Storm

The E3’s decision to activate the snapback mechanism against Iran came immediately following a brief and largely symbolic visit by International Atomic Energy Agency (IAEA) inspectors to Tehran. Iran and the parties to the 2015 nuclear agreement now have until September 27, 2025, to finalize a decision regarding the mechanism.

Tehran must either resolve outstanding nuclear concerns to delay sanctions for six months or face the full reimposition of UN measures. This file focuses on two key issues: the apparent conclusion of the Iranian nuclear diplomatic process and the IAEA inspectors’ visit to the Bushehr nuclear reactor, which took

place amid heightened tensions between Tehran and the UN agency.

The Closure of Iran's Diplomatic Trajectory to Resolve the Nuclear Dispute

Germany, France and the UK have formally initiated the 30-day snapback process to reimpose UN sanctions on Iran over its nuclear activities, submitting a letter to the UN Security Council. The European powers are pushing for the reinstatement of all previous UN sanctions and are demanding that Iran fully cooperate with the IAEA within the next 30 days.⁽⁴⁵⁾ Mohammad Eslami, head of the Atomic Energy Organization of Iran, dismissed the E3's action as predictable, stating, "Our enemies always find pretexts to pressure the Iranian nation," and accused the IAEA of acting under Western influence.⁽⁴⁶⁾

The IAEA has faced restrictions in accessing nuclear sites, leaving unresolved questions about over 400 kilograms of highly enriched uranium, refined to 60% purity — far above the 3.67% limit allowed for reactor operations under the 2015 nuclear deal. Despite US claims that some of this material was destroyed during airstrikes in the 12-day war, Iranian authorities assert it has been relocated to secure sites, possibly deep underground tunnels. Additionally, suspicions persist regarding a covert nuclear facility known as Pickaxe Mountain, which could further complicate inspections and monitoring efforts.

Parliament Speaker Mohammad Bagher Ghalibaf asserted that Iran must adopt strong deterrent measures to make the European parties pay a price for their "illegal" move and to reverse the decision to reinstate sanctions. He stressed that a unified response by Iran would soon be announced and implemented.

Echoing this stance, Foreign Ministry officials voiced similar criticisms.

Esmail Baghaei, the ministry's spokesman, remarked that Europe has "ceased to be a mediator" and has effectively transformed into "an agent of the United States and Israel." He added that the European role in the dispute would diminish...given their choice to align closely with Washington and Tel Aviv.⁽⁴⁷⁾

In the meantime, Iran has broadly prohibited state-controlled and state-run media from reporting on or discussing the potential reimposition of UN sanctions.⁽⁴⁸⁾ Authorities fear that public discussion could increase pressure on the government to act decisively and may spark public anger if citizens fully understood the economic and social costs associated with renewed sanctions, expected by the end of September 2025.

Despite the media blackout, senior Iranian officials privately acknowledge that Washington has not responded to at least 15 formal letters from Tehran requesting a resumption of negotiations. Deputy Foreign Minister for Legal Affairs Kazem Gharibabadi confirmed that US authorities have ignored Iran's outreach. US President Donald Trump told reporters, "They [the Iranians] would like to talk. I'm in no rush to talk because we obliterated their site."⁽⁴⁹⁾

Inspectors Visit Bushehr Reactor Despite Tensions

Iranian Supreme Leader Ali Khamenei has authorized the government to permit IAEA inspectors to observe the refueling process at the Bushehr nuclear reactor, which survived Israeli and US attacks and continues to operate with Russian fuel and technical support. The visit was brief and tightly controlled, with inspectors barred from approaching any officials or sites that had been targeted during the strikes.⁽⁵⁰⁾

IAEA Director General Rafael Grossi stated that the agency remains dissatisfied with Iran's level of cooperation.⁽⁵¹⁾ Tehran, however, seeks to use this symbolic visit to gradually manage its engagement with the IAEA, even as a series of allegations continue to target Grossi personally, ranging from espionage at Iranian nuclear facilities to calls for his resignation.

Days before the visit of IAEA inspectors to the Bushehr reactor, the agency's Assistant Director General Massimo Aparo met in Tehran with officials from Iran's Ministry of Foreign Affairs and the Atomic Energy Organization. The discussions focused on managing the new circumstances following the Israeli and US strikes on Iranian nuclear facilities. The meetings resulted in an agreement to continue consultations between Tehran and the IAEA. During these talks, Iran also pressed the agency to correct what

it described as a flawed approach toward the Iranian nuclear issue.⁽⁵²⁾

Conclusion

Iran has secured backing from Russia and China in its opposition to the European trio's activation of the snapback mechanism. Yet, under the terms of the JCPOA, sanctions are set to be automatically reinstated after the 30-day review period, with no additional vote required to trigger punitive measures. Tehran now faces a more precarious situation than initially anticipated following the US withdrawal from the agreement. Iran's nuclear program was undoubtedly compromised following Israeli and US strikes. Additionally, many of Iran's strategic instruments for projecting regional influence have also been weakened. Therefore, avoiding the snapback has become increasingly difficult without complying with the IAEA requirements and agreeing to suspend uranium enrichment for a defined period.

Endnotes

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