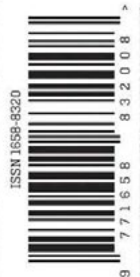


MONTHLY REPORT

Iran Case File

SEPTEMBER-OCTOBER 2025

Your window on Iran from inside and abroad





MONTHLY REPORT



Iran Case File

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EXECUTIVE SUMMARY

During September and October 2025, Iran's domestic landscape saw a wave of political, military, social and ideological developments unfold in rapid succession. At the same time, Tehran's dealings with Arab states and the wider international arena became more dynamic and layered, with each interaction feeding into the next. These overlapping external engagements, combined with internal shifts, are likely to shape the country's broader trajectory in the months ahead.

On the domestic political front, the Expediency Discernment Council cleared Iran's accession to the Convention on Combating the Financing of Terrorism (CFT). The approval, however, came with two caveats: Tehran's commitments must remain within the boundaries of the Constitution and any implementation must align with national laws. Even with these conditions, the decision ignited intense debate at home. "Hardliner" factions argue that joining the Financial Action Task Force would hand Western governments leverage over Iran by exposing sensitive financial data, undermining national security and tightening scrutiny on networks that help the country navigate US and international sanctions.

Militarily, satellite imagery cited by several news outlets indicated that Iran carried out an unannounced missile test at the Imam Khomeini Space Center. The move was aimed at strengthening Iran's defensive and offensive arsenal with a fresh genera-

tion of ballistic missiles amid concerns over possible Israeli strikes. Tehran has stayed silent on the matter, though one parliamentarian claimed — without offering proof — that the test involved an intercontinental ballistic missile. In parallel, Washington rolled out new sanctions targeting Iranian figures and companies tied to missile and drone manufacturing. Meanwhile, renewed debate over Iran's reaction to the reinstatement of UN sanctions has fueled speculation that Tehran could shift toward military-grade uranium enrichment. The concerns intensified after satellite images showed a newly built wall encircling a site near Natanz, featuring five entrances to purported underground tunnels.

On the social front, Iranians are still reeling from the fallout of the 12-Day War and the looming risk of another confrontation if no nuclear deal is reached in accordance with Western terms. The reinstated UN sanctions have added further strain, with expectations that they will deepen hardship for the Iranian people. Against this backdrop, calls have grown for easing some of the state's tight controls — ranging from demands to relax hijab enforcement and free political detainees to appeals for a lighter ideological hand on state television and fewer restrictions on internet access — to head off any public backlash. While the authorities show little sign of embracing all these demands, they have sought to calm domestic tensions by scaling

back morality police patrols and pausing fines and vehicle confiscations targeting women who do not observe the hijab.

From an ideological angle, religion assumed a prominent role in Iraq's electoral battle, with rival groups invoking religious rulings to argue either for boycotting the vote or for full participation. This turned the campaign into a contest over fatwas and religious legitimacy. The confrontation was not limited to factions aligned with Iran on one side and the Sadrist Movement on the other; it has drawn in the religious authority itself, which publicly encouraged voting — a stance widely interpreted as a message to Muqtada al-Sadr. The latter irritated by this position, quickly released what he described as a statement of reproach directed at the clerical establishment. Accustomed to framing his stance as an extension of the religious authority, he found himself instead leaning on the legacy of his father Grand Ayatollah Muhammad al-Sadr, casting his campaign as a fight against corruption and against pro-Iran loyalists.

Iran's ties with the Arab region have also been shaped by notable developments. In Iraq, tensions spiked following the assassination of Sunni parliamentary candidate Safaa al-Mashhadani and an attempted killing of another Sunni contender Muthanna al-Azzawi, a close associate of the slain candidate. These incidents underscored the unease across

Shiite political factions over the elections. Meanwhile, Washington named Mark Savaya as its new envoy to Iraq — a move widely seen as part of an effort to steer the formation of the next government and push for the dismantling of the Popular Mobilization Forces, reinforcing the principle that only the state should wield armed power.

In Syria, President Ahmed al-Sharaa's trip to Moscow has emerged as a key moment in reshaping the web of alliances surrounding the conflict. The visit highlights the shifting balance between Russia and Iran and signals a more pragmatic, selectively open direction in Syrian foreign policy. For Damascus, Moscow represents a path to reentering the international arena and easing its isolation. Iran, meanwhile, is recalibrating — seeking to reposition itself and relying more heavily on Russia as a diplomatic conduit to safeguard and revitalize its role inside Syria.

With regard to Yemen, the landscape has been shaped by a series of major developments. Externally, the Houthis have sharply intensified their threats to international shipping in the Red Sea and the Bab al-Mandab Strait, deploying explosive-filled boats and drones in increasingly dangerous operations. At home, conditions in Houthi-run ar-

eas have worsened dramatically on the humanitarian and human rights fronts, with reports of dozens of doctors and nurses detained on accusations of collaborating with foreign actors or spreading misinformation. Activists, journalists and human rights advocates have faced kidnappings and enforced disappearances, alongside extrajudicial killings targeting dissenters. On the diplomatic track, Iranian Deputy Foreign Minister Majid Takht-Ravanchi held talks with Ansarallah's chief negotiator Mohammed Abdul Salam — an engagement widely seen as part of Tehran's push to become an indispensable player in any prospective resolution to the Yemeni conflict.

Internationally, diplomatic efforts have stalled, failing to salvage what remains of the 2015 Joint Comprehensive Plan of Action. European states moved to trigger the snapback mechanism, reinstating the UN sanctions that had been lifted under the deal. The step has pushed the Iranian nuclear dossier into a far more uncertain phase. In response, Tehran has warned that it may halt its cooperation with the International Atomic Energy Agency, particularly the routine inspections of its nuclear facilities, and has even threatened to withdraw entirely from the Nuclear Non-Proliferation Treaty.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

During September and October 2025, Iran witnessed various events and developments across political, military, social and ideological spheres, which are outlined in the following themes:

- Iran Conditionally Accedes to the Financial Action Task Force
- Ambiguous Iranian Missiles Tests and New US Sanctions Against Iran
- Iranian Society and the Consequences of the 12-Day War
- The Employment of the Fatwa in the Iraqi Elections

Iran Conditionally Accedes to the Financial Action Task Force

After years of internal controversy, Iran's Expediency Discernment Council has approved the country's accession to the Convention on Combating the Financing of Terrorism (CFT), one of the Financial Action Task Force (FATF) frameworks concerned with monitoring money laundering and countering terrorism financing. Although the approval is conditional, it marks a notable shift in the establishment's stance; the Guardian Council had previously rejected the convention despite its parliamentary approval in 2018, arguing that it endangered national interests and Iranian sovereignty. This file analyzes the implications of Iran's endorsement of the CFT and the domestic divisions that this decision has produced.

Significations of Joining the FATF

Iran's Expediency Discernment Council has approved the country's accession to the CFT after nearly eight years of suspension. The decision is intended to ease external pressures on Iran, facilitate its removal from the FATF blacklist, open access to global markets and strengthen confidence in an economy strained by sanctions. The convention establishes a legal framework for preventing the financing of terrorist activities, emphasizing financial transparency, international information exchange and oversight of financial institutions. However, the approval is conditional upon two stipulations: Iran's

compliance must remain within the framework of the Constitution and implementation must align with domestic legislation. As Expediency Discernment Council Spokesman Mohsen Dehnavi stated, "If any provision of this convention conflicts with Iranian domestic laws, then Iranian domestic laws will prevail."⁽¹⁾

The FATF seeks access to financial data and the capacity to verify Iranian transactions — an issue that some Iranian policymakers fear could impede efforts to bypass sanctions and ultimately harm the country. Such concerns undergirded protracted Iranian resistance toward ratification of FATF legislation.

Economic experts, however, caution that further delays will prolong Iran's banking isolation and raise its transaction costs. The protracted postponement of ratification due to political disputes has already imposed significant burdens on the Iranian economy, including tighter banking restrictions and increased costs in international trade, all stemming from Iran's continued placement on the FATF blacklist.

From the outset, Masoud Pezeshkian's government underscored the necessity of revisiting these laws. In his first press conference, the president affirmed that easing Iran's financial and commercial engagement with the international community would be a central priority and called upon both the Parliament and the Expediency Discernment Council to re-

examine legislation related to the FATF.

This initiative follows the Expediency Discernment Council's approval in May 2025 of the Palermo Convention bill, which seeks to combat transnational organized crime. The bill criminalizes activities such as human trafficking, drug trafficking, money laundering and corruption. Iran's accession to both the Palermo Convention and the CFT constitutes the most significant prerequisites for its removal from the FATF blacklist.

Internal Divisions Over Accession to the FATF

A major obstacle to ratifying both the Palermo Convention and the CFT Convention for many years stemmed from misunderstandings and conflicting interpretations of their provisions. Because both conventions were originally drafted in English, divergent readings of key concepts emerged during the translation and interpretive processes in Parliament, the Guardian Council and the Expediency Discernment Council. Added to this was a deep-seated mistrust among Iranian decision-makers toward international institutions. "Hardliner" factions in particular regarded the FATF⁽²⁾ as an instrument of Western powers and feared that adopting and implementing these conventions would expose Iran's financial data and enable its political misuse against the country.

Iranian skepticism and distrust toward international institutions became evident in the strong backlash

that followed the Expediency Discernment Council's conditional approval of Iran's accession to the CFT, particularly within "conservative" and parliamentary circles.

Opposition began inside Parliament, where several members submitted a request requiring the government to withhold the documents pertaining to Iran's ratification. However, Parliament Speaker Mohammad Bagher Ghalibaf closed the debate by issuing the law approving accession to the international treaty on October 18, 2025 and directing Pezeshkian's government to implement it.

Opponents of the FATF framework maintain that joining the CFT will not provide Iran with an escape from US and UN economic and financial sanctions. They argue that the FATF — of which the CFT Convention is a central component — is not independent of the broader strategic policies of major powers, which they claim are determined to pressure Iran and compel it to adopt positions aligned with their own political objectives.

Concerns have also been raised that Iran's accession to the convention could undermine the foundations of national security by pressuring Tehran to make additional concessions, potentially constraining the exchange networks it uses to circumvent sanctions or forcing it to curtail its relations with resistance groups.

Legal experts, however, argue that such fears are overstated. The convention requires states to criminalize the financing of acts designated as “terrorist” under their own domestic legislation; thus, Iran can exclude sensitive areas by issuing reservations and defining its terms accordingly. These experts also note that the experiences of numerous countries show that ratifying and implementing such conventions does not necessarily entail adopting Western political positions, but rather complying with internationally recognized standards of financial transparency.⁽³⁾

Supporters of the Expediency Discretion Council’s decision view it as a means of alleviating Iran’s intensifying financial crises, particularly amid US sanctions and the reimposition of UN sanctions, which have further constricted the economy. This situation has been accompanied by sharp increases in the prices of goods and food, as well as the continued depreciation of the national currency against foreign currencies.

Proponents argue that joining the FATF framework would generate positive economic effects, including easing Iran’s access to banking intermediaries, reducing the costs of financial transactions and creating a more conducive environment for attracting foreign investment. Failure to ratify these agreements, by contrast, would deepen Iran’s financial isolation and complicate international transactions, impeding foreign trade. Even banks in states tradition-

ally friendly to Iran — such as Russia and China — have refrained from fully cooperating with Iran in the banking sector. Accordingly, compliance with FATF standards is framed as a national necessity for Iran’s reintegration into the global economy; without it, Iran’s access to international financial channels will remain obstructed.⁽⁴⁾ For this reason, advocates contend that “ratifying and adhering to the Financial Action Task Force agreements is not merely a legal obligation, but an economic reform measure essential to restoring confidence and transparency to the Iranian economy and banking system.”⁽⁵⁾

According to FATF standards, accession must be unconditional, since attaching conditions undermines the core purpose of the framework. Full membership requires heightened financial transparency and tighter oversight of the banking sector — demands that Iran views with suspicion and firmly resists. Consequently, the FATF dismissed Iran’s conditional approval as inadequate. It also reaffirmed that Iran remains a high-risk jurisdiction for money laundering, terrorist financing and the proliferation of weapons of mass destruction, urging all states to maintain robust measures to mitigate the risks posed by Tehran.⁽⁶⁾

Conclusion

Fully adopting the CFT Convention would require Iran to implement FATF rules and comply with rigorous financial transparency standards. To

avoid this, Tehran opted for conditional accession, enabling it to keep bypassing US and UN sanctions and continue funding the “Axis of Resistance.” But the FATF’s rejection of Iran’s conditions and sweeping reservations makes clear that Tehran will remain on the blacklist unless it agrees to full, unconditional compliance with the organization’s action plan.

Ambiguous Iranian Missiles Tests and New US Sanctions Against Iran

Following the activation of the snap-back mechanism, Iran faces significant challenges in rearming and preparing for potential future conflict. Its defense establishment continues to recover from the devastation of the war with Israel and anticipates the possible collapse of the ceasefire in place since June 24, 2015. In response to renewed UN sanctions and their ramifications, Iran has resumed efforts to strengthen its missile capabilities, including conducting a covert ballistic missile test. Analysts also speculate that Iran may be expanding its nuclear program, producing uranium for potential military use. In reaction, the United States has imposed additional sanctions on individuals and entities associated with Iran’s missile and drone programs to impede progress. This file examines Iran’s secret missile test, new US sanctions and ongoing concerns regarding Iran’s nuclear ambitions.

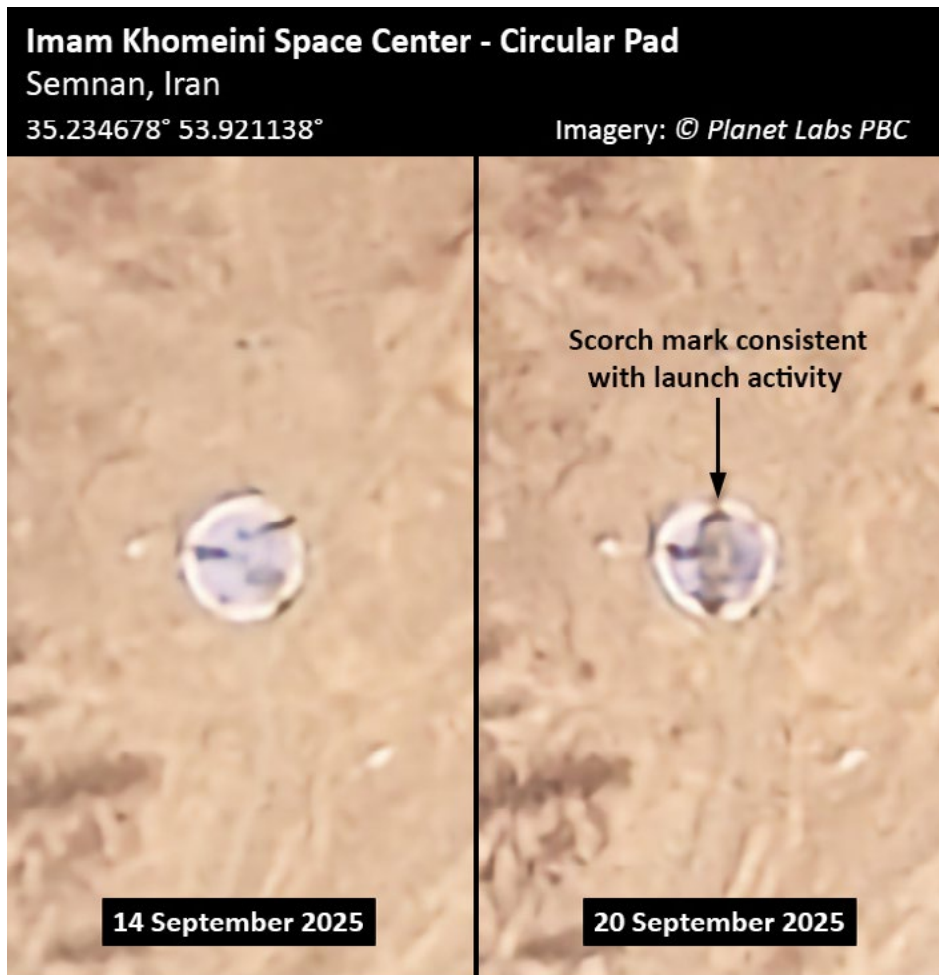
Iran Conducts a Secret Ballistic Missile Test

Tehran has historically highlighted its technological advancements, especially in the defense sector; however, it remained notably silent regarding the recent ballistic missile launch from the Imam Khomeini Space Center. Analysis of satellite imagery confirms that the launch occurred at this base, managed by Iran’s civilian space agency. The Associated Press conducted a detailed review of unofficial video footage of the launch, along with photographs of the site, to verify and document the event.⁽⁷⁾ The missile launch occurred amid stalled nuclear negotiations, the reimposition of UN sanctions and the looming prospect of renewed conflict with Israel.

Social media posts from residents of Semnan Province captured a missile’s smoke trail at sunset. Satellite imagery (Image 1) from Planet Labs indicated burn marks on the circular launch pad at the Imam Khomeini Space Center in Semnan, northern Iran. Experts have since confirmed that the missile was most likely a solid-fuel ballistic missile.

Iranian parliamentarian Mohsen Zanganeh, speaking on state television, asserted Iran’s invincibility and announced the launch of an intercontinental ballistic missile. He declared, “We will not abandon uranium enrichment, transfer uranium to the enemy, or retreat from our missile program.” Zanganeh added that the previous night, Iran successfully

Image 1: Circular Pad Images



tested one of its most advanced missiles, never previously tested, emphasizing that the intercontinental ballistic missile trial occurred despite challenging circumstances.⁽⁸⁾

Iranian missiles currently have a range of approximately 2,000 kilometers, sufficient to reach Israel, while efforts are underway to extend missile capabilities to cover the Unit-

ed States. Intercontinental ballistic missiles (ICBMs) typically have a range near 5,500 kilometers. Israel previously warned the United Nations that the Zuljanah satellite launcher, if adapted into an ICBM, could reach targets up to 5,000 kilometers away. Analysts largely concur that the unannounced missile test in-

volved the Zuljanah space launcher operating in its ICBM configuration.⁽⁹⁾

The missile test forms part of a broader effort, as Iran has initiated repairs and reconstruction at key missile program sites, including Shahroud and Parchin. Satellite imagery from Planet Labs indicates debris clearance and the erection of new structures at a minimum of two sites. Nonetheless, solid-fuel mixers have not yet been installed, suggesting that these facilities are not yet fully operational.⁽¹⁰⁾

US Sanctions Against Iranian Networks Tied to the Missile and Drone Programs

The United States imposed sanctions on 17 individuals and 21 entities for their purported roles in “procuring sensitive goods and technologies” to benefit the Iranian Ministry of Defense and Armed Forces Logistics, as well as Iran’s missile and military aircraft programs.⁽¹¹⁾ These networks were reportedly involved in the illicit acquisition of advanced surface-to-air missile technologies and the purchase of a US-made helicopter. Sanctioned entities include the Aerospace Industries Organization and its subsidiaries, notably the Shahid Bagheri Industrial Group, which oversees Iran’s solid-fuel ballistic missile program. Additional targeted procurement networks were located in Iran, Hong Kong, China, Germany, Türkiye, Portugal and Uruguay.

Speculation That Iran Could Seek to Enrich Weapons-grade Uranium

On October 18, the Iranian Foreign Ministry formally declared that Iran would cease all commitments under the Joint Comprehensive Plan of Action (JCPOA), effectively ending a decade of international oversight over its nuclear program.⁽¹²⁾ While no visible changes have occurred at the previously damaged nuclear facilities, construction continues at Pickaxe Mountain, a fortified underground site located approximately 1 mile south of the Natanz uranium enrichment complex. Satellite imagery from September 30 shows a perimeter wall surrounding the deep underground facility, previously disclosed to the IAEA, with five entrances leading to subterranean passages and additional above-ground structures. Situated only 1.5 kilometers from Natanz and deeper than prior underground facilities, the site has sparked speculation regarding potential military uranium enrichment. These concerns have further mounted due to Tehran’s continued refusal of IAEA inspection access and rejection of direct negotiations with the United States and European Troika.

Conclusion

Following the activation of the snap-back mechanism which reimposed UN sanctions on Iran, the country has focused on rebuilding its military capabilities during the current truce with Israel. This emphasis on enhancing defensive posture is a preparation for any future attacks as

its missile infrastructure has been hit hard during the conflict and would likely be a primary target again. Meanwhile, Washington is intensifying pressure on Tehran through economic and technical sanctions. This aims to prevent Iran from shifting its nuclear program toward a military path and force it to concede to a new nuclear agreement.

Iranian Society and the Consequences of the 12-Day War

Recent reports in Iranian media and across social media platforms highlight a growing erosion of public trust in the Iranian political system and rising social expectations for governmental reforms and concessions. This shift is portrayed as a direct outcome of the war's repercussions, particularly following the activation of the snapback mechanism and the subsequent intensification of Western sanctions on Iran. Such sanctions have aggravated existing social, economic and political pressures, posing risks to national security, undermining political stability and affecting social cohesion. The renewed prospect of war has left many Iranians confronting severe economic hardship while anticipating the possibility of further conflict. These conditions require rapid governmental action and the adoption of measures capable of containing public discontent. This file examines the issue in two sections: the consequences of the 12-Day War for Iranian society and public expectations for the post-war

period alongside the Iranian establishment's corresponding position.

Continued Consequences of the 12-Day War

During a period in which the country was still attempting to regain stability at all levels and to restore the wartime social cohesion that had been eroded, the Iranian establishment now confronts a challenge regarded as more perilous than conventional military confrontation: a war defined by distrust, paralysis and mounting social expectations. This situation threatens to erode the establishment's social capital and public confidence, with consequences that deeply affect public trust and the national economy —both considered foundational pillars of the political system.⁽¹³⁾ These repercussions have left many Iranians experiencing shock, uncertainty, confusion and a sense of disorientation. Khamenei described the situation as one of “neither war nor peace,” underscoring the danger inherent in its continuation. These circumstances have subjected large segments of the population to psychological strain, anger and feelings of insecurity, accompanied by fears of renewed loss and deprivation. Many are also haunted by recurring images of hunger, hardship, the wounded and the dead, and they feel powerless in the face of these memories. Professor Kaveh Qaderi, a clinical psychologist at Beheshti University, warned of post-war trauma, noting that “trauma is not just about explosions and

death; the collapse of the sense of security, leaving home, sudden unemployment and seeing repeated news of violence are all also part of the trauma.” He added that even those who were not directly exposed to the war and remained in cities are now exhibiting symptoms of anxiety and depression. His assessment is based on extensive consultations and psychotherapy sessions conducted after the conflict.⁽¹⁴⁾ According to Deputy Minister of Public Health Alireza Raisi, approximately 25% of Iranians are currently suffering from psychological disorders.⁽¹⁵⁾

Compounding the gravity of the crisis is the deteriorating economic situation, further constricted by international sanctions, with inflation approaching 35% and unemployment reportedly reaching 60% among the working-age population.⁽¹⁶⁾ High levels of economic recession and rising prices, together with weak production and investment caused by the closure of numerous companies and factories across multiple sectors, the degradation of infrastructure and the persistence of income inequality and insufficient social justice, have intensified poverty, violence, crime and entrenched structural corruption. These conditions have also contributed to higher emigration rates, growing reluctance to marry or have children and a decline in living and educational standards. Many households are unable to cover educational costs that exceed their monthly income, compel-

ling families to send children to work in order to contribute financially — an outcome that risks reinforcing patterns of ignorance. Medical services are also inadequate, with limited capacities and an inability to ensure access to necessary medicines. The war has further produced cultural distortions. For Iranian society and its ideological foundations, these cumulative repercussions may generate internal divisions and tensions, leading to fragmentation and internal erosion that could, in turn, stimulate widespread protest movements calling for regime change.⁽¹⁷⁾

Popular Expectations Following the 12-Day War and the Position of the Establishment

Public expectations in Iran have risen following what many perceive as the population’s steadfastness in the face of Israel. Iranians now anticipate that the government will offer additional concessions — especially in the realm of social freedoms — to sustain national unity and cohesion. Former Vice President Mohammad Abtahi noted that Iran’s leadership occupies a difficult position: they are weighing the relaxation of certain restrictions to safeguard national unity, yet simultaneously fear that such measures could precipitate the establishment’s collapse. A central point of contention is the new mandatory hijab law,⁽¹⁸⁾ advocated by radical “conservatives” in Parliament but rejected by “reformist” President Pezeshkian who warned that enforcing it could trigger a mass uprising.

Current assessments suggest that roughly one-third of Iranian women do not observe the hijab.⁽¹⁹⁾

Evidence suggests that the establishment has attempted to mollify domestic sentiment by addressing these demands. Women have reportedly experienced an unprecedented degree of freedom: the morality police have vanished from public spaces, penalties and vehicle confiscations for non-compliance with hijab rules have stopped and women no longer face state-imposed restrictions on public attire, even though this departs from previously entrenched social and cultural norms.⁽²⁰⁾ However, public expectations did not end with this extent of freedom; they expanded to include demands for the release of political prisoners, a relaxation of the state's ideological control over national broadcasting and the easing of internet restrictions.⁽²¹⁾ In an effort to rebuild public trust in the leadership, Pezeshkian proposed converting Iran's roughly 80,000 mosques into community centers aimed at addressing local issues, with active involvement from all sectors of society, including donors, non-governmental organizations, religious leaders, political parties and other stakeholders.⁽²²⁾ During his visit to Sistan and Balochistan, one of Iran's most disadvantaged provinces, Pezeshkian highlighted the construction and inauguration of 2,200 schools in collaboration with local communities, aiming to enhance educational quality⁽²³⁾ and promote eq-

uity. He also emphasized the implementation of the Kala Borj program — an electronic voucher system providing credit for purchasing goods — which has been expanded to four phases to support livelihoods, particularly for low-income groups.⁽²⁴⁾

This approach reflects Khomeini's emphasis on prioritizing livelihood and housing concerns, controlling unregulated price increases and ensuring the provision of essential goods to citizens.⁽²⁵⁾ Pezeshkian also stressed the need to address domestic mismanagement and internal challenges,⁽²⁶⁾ while advocating strategies to enhance relations with neighboring countries, engage with regional organizations such as BRICS and the Shanghai Cooperation Organization and accede to the Palermo Convention as well as The Financial Action Task Force in order to safeguard national interests.

Conclusion

Iran has entered a new phase that may pose risks even greater than external military threats. The establishment faces a critical dilemma: to respond to the demands of the populace that supported it during the war — restoring trust and cohesion necessary for national recovery and preparing for a potentially more destructive conflict — or to assert its authority, intensify repressive measures and risk provoking widespread discontent, revolts or coups capable of paralyzing the country and destabilizing the establishment. While indicators suggest the government may offer limited

concessions, particularly regarding freedoms, to navigate this period amid unresolved economic pressures from new sanctions, the potential for unrest remains significant in the absence of a clear long-term strategy.

The Employment of the Fatwa in the Iraqi Elections

A pronounced division developed within the Iraqi Shiite community as the parliamentary elections of November 11th approached in Iraq. Religious and political actors have swiftly turned to sectarian and religious rhetoric to consolidate their legitimacy within the Shiite constituency. Concerns arose regarding the Sadrist Movement's decision to boycott the elections, due to its potential effects on both electoral legitimacy and the dominance of winning blocs. Consequently, some factions invoke religious arguments to encourage voter participation, with claims ranging from the obligation to vote to the necessity of safeguarding the Shiite presence. In response, the Sadrists issued a fatwa affirming the right to boycott, and Muqtada al-Sadr repudiated participants, warning of plots against electoral commission offices. This file seeks to examine the sectarian sentiments invoked in the aforesaid context and the underlying political motives driving such sentiments.

Calls for Boycotting Elections

Sadr has consistently refused to participate in the elections, asserting that participation serves only corrup-

tion and the corrupt. He advocates a full boycott, a position he has maintained for a long time. In July 2025, he remarked, "Whoever wishes may boycott, and whoever wishes may pursue the lust for power."⁽²⁷⁾ He explained his rationale, "When I called for a boycott of the elections, I did not intend to postpone or cancel them. What saddens me is that a great nation would vote solely to empower the corrupt, the shameless and those who misappropriate unrecovered funds."⁽²⁸⁾

While some expected Sadr to eventually relent on his boycott decision, he remained steadfast in advocating a full and comprehensive boycott. He has castigated members of his movement who disagreed, "Because they are inclined toward corruption and disobey orders and directives, boycott them."⁽²⁹⁾ The "orders" Sadr references are clearly religious in nature, as political matters are typically subject to differing opinions. Nevertheless, he contends that a religious directive encompassing political issues has been issued, and thus his followers within the Sadrist Movement are required to implement it without dissent or disobedience.

To underscore the spiritual significance of his boycott decision and reassure his supporters, Sadr stated that he had a dream in which he met his father and brother, which he interpreted as an indication of his father's approval of his choice to boycott the elections.⁽³⁰⁾

Framing Participation as a Legal Obligation

Another faction opposing Sadr emphasized the necessity of participating in the elections as a fundamental jurisprudential obligation rather than a mere political duty within electoral competition. This situation illustrates the complexity of conflating religious and political domains. Certain religious authorities consider participation obligatory, viewing abstention as sinful, while others endorse boycotting, regarding non-boycott as sinful. The public is caught between these positions, making political choices difficult, as the religious authority holds significant sway, effectively transforming ordinary electoral decisions into acts of religious devotion.

Although Sadr and his followers were the most prominent proponents of the boycott, their opponents within the Coordination Framework and other Shiite groups — including the Dawa Party and Asa'ib Ahl al-Haq — invoked religious arguments to counter the boycott. The Sadrists' substantial influence, organizational capacity and widespread presence raised concerns regarding their potential effect on election outcomes, voter turnout and by extension the legitimacy of the Coordination Framework, which aims to fill the gap left by the Sadrists. Reflecting this sentiment, one Shiite cleric declared, "Abstaining from the elections is like selling one's honor."⁽³¹⁾

One cleric asserted, "Whoever does not vote this year is a traitor to the faith and to religious rituals, because there is a great conspiracy against Shi'ism,"⁽³²⁾ while another described boycotters as "fools."⁽³³⁾ Among the leading Shiite clerics advocating electoral participation is Ayatollah Muhammad Taqi al-Mudarrisi who cited Quranic verses and hadiths emphasizing reform, mutual enjoining of truth and the importance of selecting the most qualified individuals to oversee the nation's political, economic and cultural affairs.⁽³⁴⁾

Mudarrisi invoked the concept of "obligation" to address the issue from both jurisprudential and political perspectives. As a recognized marja, his intervention conveyed a direct message to Sadr, who has not yet attained the status of a mujtahid or formally declared such authority. Consequently, Sadr has positioned himself as adhering to the guidance of the supreme religious authority (marjaya) in Najaf, emphasizing directives against political corruption, advocating the restriction of arms to state control and promoting the removal of corrupt figures. However, this religious authority has not explicitly endorsed a boycott, instead consistently advising voters to make sound choices and to avoid reelecting previously discredited individuals.

Impacting Political Legitimacy

The central question for both opposing sides concerns whether elections fall within the sphere of religious or

political matters. If considered religious, notions of what is permissible or forbidden become relevant. If political, as political theory typically maintains, evaluation should rely on political reasoning rather than religious doctrine or established jurisprudential principles. Notably, Shiite groups often blur the distinction between the religious and political realms, treating them interchangeably in practice.

Similarly, the integration of religion and jurisprudential rulings into governance and political matters directly impacts perceptions of political legitimacy. This integration may have been deliberately cultivated by some to exert influence. The Iraqi Shiite community continues to revere jurisprudential tradition, maintains strong ties to the religious seminary and clergy and provides financial support such as khoms. As a result, their adherence extends beyond devotional practices to political matters as well. This raises the deeper question of the Guardianship of the Jurist. Although Iraq is not a natural environment for the full exercise of the Guardianship of the Jurist according to jurisprudential rulings, in practice, elections are often treated as definitive religious matters intolerant of political dissent. This creates a form of jurist guardianship that encompasses political issues but operates within the realities of political constraints. It is a guardianship lacking genuine authority, dependent on control over power, institutions, sovereign bod-

ies and security apparatuses. Consequently, those asserting the presence of the Guardianship of the Jurist in Iraq do not affect decisive change but engage primarily in political and religious debate, seeking to influence public opinion and persuade the populace.

Conclusion

Religion remains a potent force in Iraq's political sphere, employed by all sides to enhance legitimacy, mobilize popular support and shape election outcomes. Actions once deemed forbidden, such as boycotting elections, have been recast as obligatory, while participation, formerly prohibited by some, is now considered mandatory. This underscores the political instrumentalization of religion within Shiite factions, potentially fostering internal fragmentation and amplifying divisions among sectarian and religious parties. The encroachment of religious authority into inherently pluralistic political matters risks alienating the public or enabling more effective actors to reshape the political landscape, though entrenched ideological and transnational interests complicate such change. Historically, justifications for boycotts existed in prior elections, indicating that framing participation or abstention as obligatory is primarily a political maneuver reflecting factional competition. Consequently, the supreme religious authority is likely to maintain a distant role, acting as advisor and guide rather than an active participant in the conflict.

IRAN-ARAB INTERACTIONS

During September and October 2025, Iran's relations with some Arab countries were shaped by a series of significant developments. Iraq witnessed the outbreak of political violence ahead of the parliamentary elections with the targeting of two prominent Sunni candidates, resulting in the death of one. The US administration appointed a new envoy to Baghdad, seemingly aiming to influence the country's next phase of governance. In Syria, President Ahmed al-Sharaa's visit to Moscow sparked wide reactions across Iranian political and media circles, raising questions about Tehran's role in the evolving Syrian equation. In Yemen, key dynamics included ongoing maritime threats and escalations against Israel, a stalled political settlement and a sharp decline in humanitarian and human rights conditions in Houthi-controlled areas.

Iraq's Sixth Parliamentary Elections — Preceding Developments

As Iraq prepared for its sixth parliamentary elections, October 2025 brought major developments reflecting Shiite unease over the potential outcomes and efforts to unsettle the political landscape. The first was the assassination of Sunni electoral candidates and the second was Washington's appointment of a special envoy to shape the next phase of governance in Iraq.

Assassinations Targeting Young Sunni Candidates

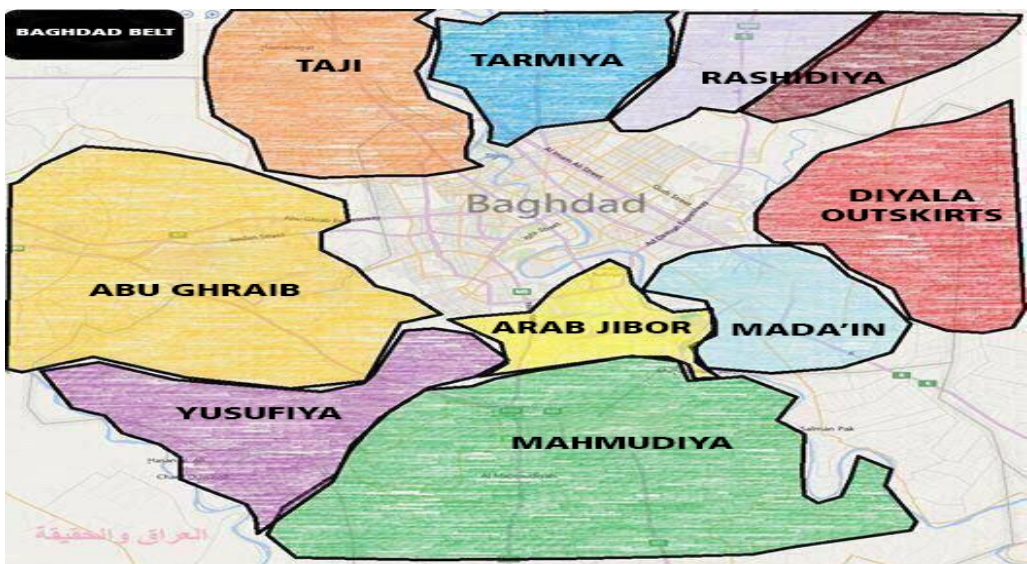
Two Sunni candidates were subjected to assassination attempts. The first, which proved fatal, targeted Baghdad Provincial Council member Safaa al-Mashhadani on October 15, 2025, as he was returning home to Tarmiya after an election rally. A bomb attached beneath his car — believed to resemble a Tahoe model — detonated, killing him instantly and injuring four colleagues. The second attempt targeted another council member, Muthanna al-Azzawi, in Yusufiya, south of Baghdad, just three days later. Gunfire

struck his office, wounding two of his aides, though Azzawi himself survived.

Tarmiya and Yusufiya — two districts within Baghdad's predominantly Sunni belt — are areas where Iran-backed militias, notably Harakat Hezbollah al-Nujaba and Kata'ib Hezbollah, maintain a strong presence under the pretext of preventing the resurgence of terrorist groups. The two targeted Sunni candidates are widely popular figures, as reflected on their Facebook pages,⁽³⁵⁾ and are known for being young, energetic and active in charitable and community work.

They have earned reputations as outspoken critics of militia dominance and the unregulated spread of weapons as well as ardent opponents of corruption and advocates of state authority and security in northern Baghdad. Their expanding popularity threatens to undermine Shiite rivals' influence in Baghdad Province. Their most notable initiatives and public activities include:

- Mashhadani played a pivotal role in community development, focusing on improving water and electricity services,



facilitating marriages and advancing social reconciliation. His most controversial involvement, however, was in the agricultural lands issue — a topic considered off-limits by the militias dominating Tarmiya. Notably, one day before his assassination, the Baghdad Provincial Council passed critical resolutions on agricultural lands that directly opposed militia interests,⁽³⁶⁾ most importantly revoking all investment licenses issued in violation of those resolutions. This decision threatened to strip militias of vast tracts of seized lands and lucrative investments, rendering Mashhadani's stance a serious challenge to their economic and political power.

■ Azzawi, a close ally of Mashhadani, was leading efforts to digitize Baghdad Governorate's administration through automation and e-governance reforms — a project aimed at transforming the local bureaucracy into smart governance systems. The initiative sought to curb corruption, enhance transparency and dismantle networks of influence entrenched in state institutions. Such reforms directly threatened the militias' entrenched control over government departments and patronage systems, placing Azzawi in confrontation with some of the most powerful forces operating in the capital.

Mashhadani and Azzawi represent a younger generation of Sunni youth, distinct from figures such as Mohammed al-Halbousi, Muthanna al-Samarrai, Khamis al-Khanjar and Ziyad al-Janabi. Unlike the previous generation, they embrace modern digital and technological ideas rather than traditional ideological frameworks. They display extreme independence and resist established sectarian or ethnic divisions. Their dynamism and energy drive them to actively seek change in the difficult reality they face,

and they are bold in raising their demands and opinions, showing indifference to the personal dangers posed by weapons. Moreover, they rebel against traditional hierarchies, motivated by a commitment to modernity and progress rather than maintaining outdated structures. This generational shift signals a move away from the politics of polarization and patronage, favoring innovation, transparency and civic activism.

Appointing a US Envoy to Iraq

In light of regional developments that have historically weakened Iran and its allies, forcing them into a defensive posture after years of offensive operations, and with the United States considering Iraq as the next arena for reducing Iranian influence, US President Donald Trump appointed Mark Savaya as special envoy to Iraq. Reports indicate that Savaya, a prominent donor to Trump's presidential campaign in Michigan — a state pivotal to his election victory — was tasked with several objectives: resolving the issue of armed factions and establishing a state monopoly on weapons by disbanding the Popular Mobilization Forces (PMF) and disarming those operating outside the law; repealing the PMF law; restructuring the new Iraqi government, particularly the ministries of finance, oil, interior and defense, as well as the Central Bank⁽³⁷⁾ governorship and strengthening US-Iraq economic relations.

Analysts have described Savaya as a new American governor for Iraq. His initial statement, "I want to make Iraq great again," was widely seen as patronizing. By appointing Savaya, Trump may have sought to engage directly with Baghdad through the White House, bypassing traditional diplomatic channels, while granting the envoy full authority to act at

all levels. Savaya's prior mediation, which secured the release of his friend, the Russian-Israeli researcher Elizabeth Tsurkov, showcased his effectiveness in negotiating with armed militias. His Iraqi origins — he is Christian — combined with his deep understanding of Iraq and extensive network of local contacts, positioned him as a suitable choice.

The unconventional nature of this appointment, including Savaya's past links to the cannabis industry, aligns with Trump's tendency to eschew traditional protocols, his skepticism toward formal diplomatic channels and his reliance on pragmatic, rapid approaches and business acumen in deal-making. As such, Savaya is poised to play a significant role in strengthening economic and political ties between Washington and Baghdad.

Conclusion

The abovementioned developments indicate that Iraq is entering a new phase in both its internal and external orientations following the sixth parliamentary elections in which Prime Minister Mohammed Shia' al-Sudani emerged victorious. Consequently, Iran and its allies in Iraq fear the potential repercussions of this next phase on their political and strategic gains amid regional and international pressures. In response, they are seeking to demonstrate their ability to disrupt the situation, aiming to incite Shiite forces dissatisfied with the elections to inflame tensions through targeted assassinations, thereby sending a message that Iraq remains insecure and unprepared for parliamentary processes. Adding to the challenge, a new generation of Sunni youth, emerging in this electoral cycle with distinct ideas and orientations, presents the most significant and potentially destabilizing opposition to a state dominated by lawlessness or militia

influence. What makes this development particularly consequential is the broad popular support this generation has garnered, positioning it at the forefront of the sixth-round elections and threatening to reshape Iraq's political landscape.

Sharaa's Visit to Moscow From an Iranian Perspective

Syrian President Ahmed al-Sharaa's visit to Moscow marks one of the most consequential turning points in Syria-Russia-Iran relations since the fall of the previous Syrian regime. The trip holds unusual symbolic weight: it represents a government that, until recently, had been the focus of Russian military and diplomatic efforts aimed at preserving Bashar al-Assad's rule before its collapse. This development signals a new phase in the Syrian conflict — one defined by shifting alliances and a reassessment of interests in light of emerging political realities.

The most telling dimension, however, lies in Tehran's reaction. Iran now faces a development that has stirred unease, particularly as Russia — its former partner in the Syrian conflict — moves swiftly to engage with the new leadership in Damascus and assume a more assertive role.

This file examines the implications of Sharaa's Moscow visit through several key questions: what motivated Syria's new leadership to reach out to Moscow at this specific moment? Does this outreach indicate a recalibration of Damascus' foreign policy priorities and its understanding of sovereignty and alliances? How does Tehran interpret the Syrian-Russian rapprochement and what strategies is it likely to pursue in response? Most crucially, does this visit mark the beginning of Iran's waning influence in Syria — or an opportunity for

Tehran to redefine its presence through Moscow's channel? The following analysis explores these issues in depth.

The Syrian Calculus: Openness to Moscow and the Limits of Realpolitik

Sharaa's visit to Moscow in October 2015⁽³⁸⁾ ignited intense debate across Syria's political and media circles. Opinions diverged sharply: some regarded the visit as a pragmatic necessity shaped by the realities of the current stage and the imperatives of state interest, while others viewed it as a setback to popular aspirations for a decisive break from the legacy of the former regime.

Nevertheless, Damascus considers its renewed engagement with Moscow a strategic imperative dictated by the international balance of power. Despite its controversial role in the Syrian crisis, Russia remains a global heavyweight — wielding influence through its permanent seat on the UN Security Council, its leverage over sanctions and its economic and investment potential, which Syria urgently needs for post-war reconstruction.

From this standpoint, the new Syrian leadership seeks to employ its relationship with Russia as part of a broader foreign policy repositioning — one aimed at breaking international isolation and reclaiming diplomatic visibility. Yet, it also strives to preserve the limits of national sovereignty, ensuring that rapprochement with Moscow does not evolve into full dependency.

Moscow, for its part, has come to realize the necessity of moving beyond the shock of Assad's collapse and acknowledging the new realities on the ground in order to safeguard its strategic interests. Chief among these are maintaining its foothold in the Hmeimim airbase and the Tartus naval facility, as well as pro-

tecting its vast economic stakes in Syria, which span dozens of sectors and projects — particularly in the vital energy domain.

Iran: Concerned and Closely Watching

The Syrian president's visit to Moscow, followed by the visit of Russian envoy Alexander Lavrentiev to Tehran, ignited a wide-ranging debate within Iranian political and media circles, centering on Tehran's position in the emerging Syrian landscape. While some Iranian newspapers described Sharaa's trip as a source of measured political unease — suggesting that Moscow might be forging a more direct line to Damascus, thereby reducing Iran's central role as a strategic intermediary — others interpreted Lavrentiev's subsequent visit as an effort to reassure Tehran that the Russian-Iranian partnership remained intact despite Syria's shifting dynamics.

Meanwhile, Shargh⁽³⁹⁾ newspaper portrayed Moscow's diplomatic activity as an attempt to build bridges between Tehran and Damascus, framing Russia as a potential mediator in Syria's new transitional phase. In contrast, Donya-e-Eqtasad took a more pragmatic stance, asserting that Iran was seeking to reassert its presence in Syria through Russian mediation⁽⁴⁰⁾ after losing much of its direct influence following the collapse of Assad. This perspective was echoed by several Iranian analysts, who emphasized that Iran's national and security imperatives now make the restoration of relations with the new Syrian leadership an urgent necessity.

These Iranian statements and positions reveal a form of cautious pragmatism guiding Tehran's current approach. Iran now perceives its relationship with Syria less as an ideological alliance and more as a matter of security and geopo-

litical necessity. Reestablishing ties with the Syrian state is viewed as vital to maintaining regional power balances that directly affect Tehran's strategic interests — particularly in Lebanon and with Hezbollah.

At the same time, Iran acknowledges that Russia has emerged as the most effective conduit for reestablishing its influence in Syria amid shifting regional dynamics and the erosion of its former foothold. Consequently, Tehran's stance reflects a deliberate process of recalibration — anchored in preserving its strategic partnership with Moscow as a safeguard while cautiously reopening communication with Damascus through the Russian channel. This approach enables Iran to sustain its regional presence and relevance without confronting a new political landscape that no longer accommodates its previous mode of dominance.

Conclusion

It can thus be concluded that Tehran perceives Sharaa's visit to Moscow as a development that deepens its ongoing strategic predicament. The visit marks a decisive shift in the regional balance of power, strengthening the international and regional legitimacy of the new Syrian leadership at the expense of the long-standing Moscow-Tehran partnership that, for over a decade, revolved around supporting the Assad regime.

This partnership has now evolved into a more pragmatic Russian-Syrian relationship, rooted in shared interests rather than ideological alignment or coordinated axes, thereby diminishing Iran's leverage in the Syrian arena. Consequently, Tehran finds itself compelled to reassess both its tools of influence and its broader regional strategy.

From this perspective, Iran views the emerging Russian-Syrian alignment with apprehension, interpreting it as a signal of a gradual redrawing of alliances to its disadvantage — where influence shifts from the Tehran-Damascus axis to the Moscow-Damascus axis. Yet, despite these concerns, Iran continues to act with deliberate pragmatism, recognizing that maintaining open channels with Moscow remains essential to mitigating losses and adjusting to a political reality increasingly defined by diplomacy, economic pragmatism and mutual interests rather than military dominance.

The Houthis: Between Regional Escalation and Freezing the Political Settlement

The Yemeni conflict has seen a marked escalation in the Houthi group's activities over the past two months, both militarily and politically. This rise in aggression coincides with growing regional tensions linked to the Israeli war in Gaza and increased Iranian involvement in the Red Sea. The Houthis have effectively become an instrument of Tehran, employed to destabilize the region through drone and ballistic missile attacks targeting Israeli shipping in the Red Sea, thereby threatening navigation through the Bab al-Mandab Strait, a critical global maritime chokepoint.

At the same time, UN efforts to revive the peace process have repeatedly stalled, hindered by disputes between the Yemeni government and the Southern Transitional Council, and compounded by the Houthis' refusal to engage in genuine negotiations. This file examines the key dynamics of the Yemeni landscape over the past month, focusing on maritime threats, the escalation against Israel, internal divisions and the impasse in reaching a political settlement.

Rising Houthi Threats to Maritime Navigation

Since early September 2025, the Red Sea has experienced a wave of Houthi attacks on commercial vessels, targeting ships linked to Israel as well as those from Western countries. On September 12, the US Department of Defense reported at least eight attacks using explosive-laden boats and suicide drones,⁽⁴¹⁾ partially disrupting maritime traffic near the Bab al-Mandab Strait. Despite intensified US-led air operations against launch sites in Hodeidah and Saada, the Houthis retain advanced capabilities, largely due to continued Iranian support. British maritime reports indicate that 24%⁽⁴²⁾ of ships were rerouted via the Cape of Good Hope, doubling economic costs and affecting global supply chains. These developments underscore that the Houthi threat to strategic maritime routes persists, serving as a bargaining tool amid mounting international pressure.

Houthi Drones Targeting Israel and the Employment of the Palestinian Cause

In the lead-up to ceasefire negotiations, the Houthis intensified their propaganda in support of the Palestinian resistance while carrying out symbolic attacks on Israel using long-range missiles and drones. In mid-September, the Israeli Ministry of Defense reported intercepting three drones launched from Yemen toward Eilat,⁽⁴³⁾ reigniting Red Sea maritime tensions. While the attacks had limited military effect,

they yielded significant media and political gains, allowing the Houthis to portray themselves as part of Iran's "Axis of Resistance" amid mounting internal pressure in Sana'a due to economic decline and deteriorating services. Houthi leader Mohammed al-Bukhaiti declared that "operations against the Zionist regime would continue as long as the aggression against Gaza continues," linking the group's legitimacy to the regional conflict. Western intelligence confirmed that some drones were assembled in Yemen using Iranian components, highlighting a direct operational connection between Sana'a and Tehran and emphasizing the growing regional role of the Houthis.

The Internal Situation and Mounting Human Rights Violations

The military and political escalation in Yemen has been accompanied by a sharp deterioration in the humanitarian and human rights situation in Houthi-controlled areas. Civilian and worker rights, particularly in the health sector, have worsened significantly. Local and international organizations report continued attacks on hospitals and medical centers,⁽⁴⁴⁾ whether through their conversion into military headquarters or depots for the storage of weapons. Arrest campaigns have targeted dozens of doctors and nurses accused of "collaborating with foreign entities" or "spreading rumors." The health sector is collapsing due to medicine and equipment shortages, coupled with the monopolization of humanitarian

aid. Kidnappings and enforced disappearances of activists, journalists and human rights defenders have surged. Human rights organizations documented over 25 arbitrary arrests in Sana'a and Dhamar during the second half of September 2025, along with extrajudicial killings in Amran Governorate. Repression in Houthi prisons continues, with detainees denied visits and medical care and some held in secret locations without charges or trials.⁽⁴⁵⁾ These practices demonstrate that the Houthis systematically use repression as a tool for social and political control, exploiting the absence of independent oversight and judicial institutions, which exacerbates human suffering and undermines the prospects for building trust necessary for any future peace process.

The Political Process and the Freezing of the Settlement Trajectory

On the political front, the Yemeni crisis has seen little progress toward a settlement. UN Envoy Hans Grundberg's attempts to bring the Houthis back to the negotiating table have failed. Despite ongoing Saudi-Omani meetings with Yemeni parties in Muscat and Riyadh,⁽⁴⁶⁾ the group continues to reject the roadmap proposed earlier this year, which includes provisions for salary payments and reopening roads in Taiz, claiming conditions are not conducive to an agreement. At the same time, tensions are rising in southern Yemen between the Southern Tran-

sitional Council and the internationally recognized government, further complicating the peace process. Analysts suggest that the Houthis' continued escalation in the Red Sea and their exploitation of the Palestinian issue are aimed at buying time and delaying political obligations while waiting for regional shifts that could strengthen their negotiating position. Nevertheless, Saudi-Omani efforts persist through indirect channels to maintain the humanitarian truce and prevent a full collapse of security in the country.

The Iranian Presence and Efforts to Engineer the Peace Roadmap

In late October 2025, Tehran hosted a high-level meeting between its Deputy Foreign Minister Majid Takht-Ravanchi and Ansarallah's chief negotiator Mohammed Abdul Salam to discuss the implementation of a "roadmap for peace in Yemen." The meeting marked a shift in Iran's approach, moving from indirect influence via military and logistical support for the Houthis to direct political engagement in shaping the country's future. Official reports indicated that the two sides exchanged views on political developments and ongoing consultations with various parties regarding the roadmap's implementation.⁽⁴⁷⁾ This development underscores Tehran's ambition to position itself as a key player in any future settlement, reflecting its broader strategy to leverage the Yemeni issue to bolster regional presence and expand

political influence. Meanwhile, the Saudi-led coalition backing the legitimate Yemeni government continues to advocate political solutions that safeguard Yemen's security, stability and unity, ensuring that any settlement is rooted in the will of the Yemeni people and aligns with recognized peace frameworks, thereby preventing external actors from exploiting the process to consolidate influence and threaten Gulf and Arab security.

Conclusion

The Yemeni landscape during September and October 2025 highlights the Houthi group's continued exploitation of regional leverage, driven by escalating Iranian support. The Red Sea has emerged as a stage for the

proxy confrontation between Tehran and Washington. While Houthi attacks on Israel enhance the group's media visibility, they simultaneously deepen its political isolation and undermine prospects for a domestic settlement. Moreover, the fragile dynamics in the Red Sea and the Bab al-Mandab Strait elevate the conflict beyond Yemen's borders, making it a key component of the regional and international security framework. Consequently, meaningful progress toward a political resolution remains contingent on a reduction in Iranian influence and the establishment of a regional consensus that secures Yemen's neutrality within the "Axis of Resistance."

IRAN'S RELATIONS WITH INTERNATIONAL POWERS

Iran's ties with Western powers have been dominated by Europe's move to activate the snapback mechanism, reinstating UN sanctions after Tehran's diplomatic efforts faltered. This development has placed Iran in a precarious position, facing difficult decisions, each carrying the risk of severe consequences.

European Countries Reactivate the Snapback Mechanism, Reinstating UN Sanctions on Iran

UN Security Council sanctions were reinstated following the collapse of the European Union's (EU) efforts to extend the deadline for activating the snapback mechanism and to persuade Iran to resume direct, unconditional negotiations with the United States. The EU sought to ensure Iran returned to compliance with its commitments under the 2015 Joint Comprehensive Plan of Action (JCPOA) and addressed its stockpile of highly enriched uranium.

Despite Russia's opposition to the reimposition of sanctions, it could not block the snapback mechanism, which allows any JCPOA participant to restore all UN sanctions previously lifted under the agreement without the possibility of a veto. This file examines the failure of Iran's diplomatic initiatives to prevent the return of UN sanctions and evaluates the options available for Tehran to counter their effects.

Iran's Failed Bet on Diplomacy to Prevent the Reinstatement of Sanctions

On September 27, 2025, UN sanctions against Iran were reinstated, effectively nullifying the 2015 nuclear agreement. The UK, France and Germany stated that Iran had failed to address their concerns or meet the requirements for an extension, noting that Tehran had not granted the International Atomic Energy Agency (IAEA) renewed access to nuclear sites nor submitted reports on its

stockpile of highly enriched uranium.⁽⁴⁸⁾

Iran, in response, labeled its talks with the three European countries as "failed diplomacy" and denounced the reimposition of UN sanctions as "illegal," arguing that the measures reflected a calculated misjudgment based on the assumption that pressure would force compliance, which Tehran rejected as a miscalculation that would not resolve the crisis.⁽⁴⁹⁾

The foreign ministers of the UK, France and Germany emphasized in a joint statement that "the reimposition of UN sanctions is not the end of diplomacy." They added that they urge Iran to avoid any escalatory actions and to return to compliance with its legal safeguards obligations, signaling that diplomatic engagement remained possible despite the sanctions.⁽⁵⁰⁾

In a last-ditch effort to delay the reinstatement of sanctions, Iran reached an agreement with the IAEA through Egyptian mediation. While Iranian officials struggled to present the new framework to the public as a victory, the IAEA lauded the Cairo talks, describing them as "a step in the right direction."⁽⁵¹⁾ In response to domestic criticism, Foreign Minister Abbas Araghchi denied that Iran had granted the IAEA access to its bombed nuclear facilities, including Natanz.⁽⁵²⁾ Tehran had initially proposed a phased plan aimed at restoring confidence and transparency, but following the reimposition of UN sanctions,

Iran suspended the Cairo agreement and abandoned this approach.⁽⁵³⁾

Iran's Options

Following the activation of the snap-back mechanism and the reinstatement of all UN sanctions predating the 2015 nuclear agreement, the Iranian Parliament debated a range of high-stakes options, from suspending its monitoring and inspection commitments with the IAEA to a full withdrawal from the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). Given Iran's complex circumstances, abandoning its IAEA obligations may presage withdrawal from the NPT. With 408 kilograms of uranium enriched to 60% and over 1,000 kilograms enriched to 20%, exiting the treaty would confirm long-standing suspicions about its nuclear program and heighten the risk of US and Israeli strikes on both existing and potential new sites.

Tehran might instead attempt a direct channel of communication with Washington while continuing to restrict IAEA access, a high-risk domestic strategy given the leadership's reliance on defiant rhetoric. Achieving a new nuclear agreement with the Trump administration would require substantial concessions, especially as Türkiye has already started reducing Iranian oil imports under US pressure, with India possibly following.

Alternatively, Iran could endure sanctions while advancing its nucle-

ar weapons program from secret locations, such as the Pickaxe Mountain facility, potentially establishing a credible nuclear deterrent within roughly two years before formally withdrawing from the NPT. Throughout this period, Tehran would likely use diplomatic maneuvering to avoid a repeat of the 12-Day War, pursuing the incremental, low-risk tactics it has favored since 1979, even under severe international pressure.

Conclusion

Despite the attacks and assassinations Iran endured during the 12-Day War, along with European pressures preceding the activation of the snapback mechanism, Tehran has remained resolute in rejecting what it considers unfair US conditions for a new nuclear agreement. While immediate withdrawal from the NPT may not be a priority, Iran could reconsider its cooperation with the IAEA or further restrict inspections of its nuclear sites.

Western assurances that the reimposition of UN sanctions does not mark the end of diplomacy reflect the urgent need for a sustainable resolution to the Iranian nuclear issue. The insistence on reinstating sanctions is therefore part of a broader strategy of maximum pressure, designed to compel Iran to make concessions and return to the negotiating table.

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