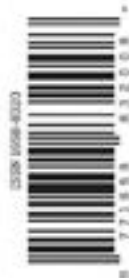


MONTHLY REPORT

Iran Case File

November-December 2025

Your window on Iran from inside and abroad





MONTHLY REPORT



Iran Case File

November-December 2025

ISSN 1658 - 8320

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EXECUTIVE SUMMARY

The Iranian Situation Report for November and December 2025 highlights the most significant developments witnessed in Iran during this period. Domestically, it discusses political, military and ideological developments, while externally it examines Iran's relations with its Arab surroundings — such as Iraq, Syria and Yemen — as well as its interactions with certain international powers, including the United States.

Politically, protest momentum returned to the Iranian landscape despite the establishment's determined efforts to avoid such a scenario, particularly at a moment when Iran faces serious threats of renewed war with Israel and the United States. The deterioration of socio-economic conditions — driven by inflation, soaring prices and currency collapse under sanctions — pushed Iranians to protest on December 28, demanding urgent solutions. The demonstrations quickly evolved into political demands and expanded geographically to all Iranian provinces. Fearing loss of control, especially after US warnings against suppressing protesters, the government blended flexible containment with lethal force. However, as the protests escalated, the government prioritized lethal force, reflected in the rising death toll — an approach likely to prolong the unrest and encourage potential US intervention under the banner of supporting demonstrators.

Militarily, the 12-Day War inflicted major losses on Iran's military leadership and exposed weaknesses in its defensive capabilities, prompting a restructuring of senior ranks through new appointments in December 2025. On the level of military exercises, Iran conducted a major drill in the Arabian Gulf on December 5, 2025, named Eghtedar-99, its second training exercise since the end of the 12 -Day War, employing a range of ballistic and cruise missiles, including the previously unknown 303 ballistic missile. Regard-

ing military cooperation, leaked Russian documents from September indicated that Iran would receive 16 Su-35 fighter jets between 2026 and 2027.

Ideologically, Iraq's Grand Ayatollah Ali al-Sistani issued a fatwa recommending avoidance of praying behind imams who receive government salaries. The ruling was interpreted as serving two purposes: first, pressuring Iran-funded actors inside Iraq seeking dominance over Najaf; and second, pressuring the Iranian establishment in Qom in favor of independent clerics supported by Najaf. The fatwa comes amid a highly complex moment for Iran: mass demonstrations led by the bazaar — the historical financier of the seminary — Qom's preparations for the succession of Khamenei and the looming post-Sistani era. Thus, Sistani's ruling represents an additional layer of pressure on the Iranian establishment, possibly to push it toward adjusting its behavior toward Najaf and Iraq, or to preserve the historical legacy of the seminary and the marjaya, or both.

Externally, Iran's relations with the Arab environment witnessed major developments. In Iraq, the report examines the features of the Shiite, Sunni and Kurdish electoral alliances participating in the 2025 parliamentary elections, where the dominant theme was fragmentation across sectarian and ethnic blocs and even within each component. The report also interprets the election results, alliance shares and implications — such as high voter turnout, the dominance of militia groups over civilian alliances, with militias winning around 60 seats while most civilian alliances failed to secure representation except for the Alternative Alliance, and the renewed rivalry between Nouri al-Maliki and Mohammed Shia' al-Sudani over forming the govern-

ment, echoing the 2021 scenario between Maliki and Muqtada al-Sadr due to neither bloc securing a comfortable majority.

Regarding Syria, a year after the fall of Bashar al-Assad's regime, Iran appears unable to rely on the traditional logic of a state ally. It has shifted from direct control to managing a flexible influence built on local networks and shadow actors. This shift reflects Tehran's recognition that its previous tools are no longer effective in a fragile political and security environment, and that sustaining its presence requires adaptable strategies aligned with the new authority and regional and international pressures.

At the same time, Iranian influence abroad has ceased to be merely an external file and has become a domestic burden weighing on Iranian authorities, especially amid the December 2025 protests, which partly linked Iran's regional engagements to worsening internal living conditions. Iran therefore faces a dual challenge: maintaining maneuverability in Syria through controlled disorder while reducing political and social costs at home.

In Yemen, November and December 2025 marked a pivotal phase that saw the restructuring of the legitimate Yemeni government after the military coup carried out by the UAE-backed Southern Transitional Council (STC), which seized Hadramawt and Shabwa by force. This irresponsible move was met with a decisive Saudi response that restored government control over all areas seized by the STC. The operation represented a turning point that reconfigured alliances within the political components of the legitimate government, strengthened their cohesion and unified their ranks after the UAE's exit from the Yemeni scene — aligning their strategic vision to confront

the Houthi threat, and continues to monitor developments with great caution.

Internationally, stagnation continues to dominate Iran's relations with the United States, amid the Trump administration's pursuit of strategic gains from Iran following the sharp decline in its regional influence, alongside internal pres-

ures on the establishment and the heavy constraints imposed by US sanctions on the Iranian economy. Yet the establishment still appears intent on buying time, prompting Trump to again threaten a return to military action to intensify pressure on Tehran.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

Iran's domestic landscape witnessed numerous events and developments throughout November and December 2025 across the political, military and ideological spheres. These are examined through the following key themes:

- The economic crisis restores protest momentum across Iran.
- Iran's radical military restructuring amid concerns over a renewed war.
- The Najaf Marjaya and the fatwa on government-paid clerics.

The Economic Crisis Reignites Protest Momentum in Iran

Since December 28, 2025, Iran has experienced a new wave of popular protests driven by a deepening economic crisis, soaring inflation, rising food prices and the sharp depreciation of the Iranian rial. The protests began in Tehran, initially led by shopkeepers and bazaar vendors demanding economic relief, but quickly spread to all 31 provinces. They soon evolved into politically charged demonstrations, with protesters chanting slogans against the ruling establishment and openly calling for its overthrow. These protests constitute the largest nationwide unrest since 2022, when demonstrations erupted across Iran following the death of the young Kurdish woman Mahsa Amini after her arrest by the so-called morality police. This section examines these rapidly unfolding developments through three main themes: the motives and demands of the protesters, the establishment's response and the role of US and Israeli threats, as well as the critical timing for the Iranian establishment.

Protesters' Motives and Demands

All segments of Iranian society are suffering from the persistent surge in prices, particularly basic food commodities such as bread, whose annual price increase has exceeded 70%, in addition to sharp rises in the costs of education, medicine and housing. Overall, the Iranian economy has significantly deteriorated following the recent Israeli strikes, with financial and economic pressures intensifying after the reimposition of UN and European sanctions in the final quarter of 2025. These developments forced the government to adopt austerity measures, lift foreign currency subsidies and cut public spending.

The impact of these policies was most evident in the collapse of the national currency, as the dollar surpassed 143,000 tomans in mid-December — an increase of nearly 20% compared to November 2025. The sharp decline in living standards, driven by inflation, rising prices and currency depreciation under sanctions, pushed Iranians into the streets on December 28, demanding immediate solutions to their worsening conditions.

The bazaar emerged as the epicenter of the protests, with merchants in central Tehran shutting down their shops in protest over their inability to conduct business amid the rapid depreciation of the toman and the depletion of foreign currency reserves. As the protests expanded, they quickly moved beyond purely economic grievances and evolved into explicit political demands, spreading to more than 186 cities across all 31 provinces. Demonstrators chanted slogans directly targeting the establishment and its leadership, including: “Death to the dictator,” “Down with Mr. Ali,” “Death to Khamenei,” “We don't want the Islamic Republic” and “The mullahs must go.”

The Establishment's Reaction to the Protests

Against the backdrop of mounting external threats and internal pressures, the Iranian establishment adopted a dual approach combining violence with a new strategy of what it termed “flexible containment” in dealing with protesters. Supreme Leader Ali Khamenei formally acknowledged citizens' right to protest by admitting the existence of economic stagnation and deteriorating living conditions — a position echoed by President Masoud Pezeshkian, who went further by calling for dialogue with protesters and announcing limited corrective measures.

Most notably, Pezeshkian replaced the governor of the Central Bank, appointing Abdolnasser Hemmati in place of Mohammad Reza Farzin, with Hemmati pledging to restore economic stability.

On the security front, the response centered on the large-scale deployment of police and riot-control units, the dispersal of some demonstrations using tear gas and other crowd-control measures, the tightening of restrictions on internet services and the suspension of in-person classes in some universities in favor of distance learning. These measures ultimately escalated into the use of live fire against protesters in certain areas, where crowd sizes had grown significantly, raising fears that the protests could spiral out of control. Although no precise figures are available, human rights organizations reported heavy casualties: the HRANA agency documented 544 deaths, including 47 members of the security forces and police as well as a public prosecutor,⁽¹⁾ while the Iran Human Rights Organization, based in Norway, reported at least 192 fatalities⁽²⁾, even as other estimates suggested that the death toll may have exceeded 2,000.

US-Israeli Threats and the Sensitivity of Timing for the Iranian Establishment

The current wave of protests has erupted at an exceptionally sensitive and perilous moment for the Iranian establishment, which is already facing mounting and escalating threats from the United States and Israel. Tehran is bracing for the possibility of further military strikes following those it endured in June 2025, and the persistence and geographical spread of the protests — alongside the rising number of casualties — could provide Washington and Tel Aviv with a strategic opening to accelerate pressure or military

action against Iran. This risk has been amplified by the explicit threats and red lines articulated by US President Donald Trump on his Truth Social account, where he warned: “If Iran shoots and violently kills peaceful protesters, as it has done in the past, the United States will intervene to save them.” This marks the first time the United States has issued such a direct warning to the Iranian establishment, a development that could sustain the momentum of the protests and potentially pave the way for US intervention under the banner of supporting demonstrators.

In Israel, while Prime Minister Benjamin Netanyahu reportedly instructed cabinet ministers to refrain from commenting on the Iranian protests — apparently to deny Tehran the opportunity to frame the unrest as the product of an external conspiracy — the country’s intelligence agency, the Mossad, released a message in Persian expressing support for the protesters, and former Prime Minister Naftali Bennett publicly called on Iranians to take to the streets.

Conclusion

The trajectory of events in Iran suggests that the protests, which began in late 2025 and remain ongoing, are likely to escalate in the coming period, particularly in light of the temporary and unconvincing measures put forward by the government to placate protesters.

The Iranian establishment has so far adhered to a strategy of “flexible containment,” reflecting the distinctive nature of the current protests and seeking both to prevent them from evolving into an existential threat and to deny them the external backing that distinguishes this round of unrest. Nevertheless, the government may continue with its strategy of lethal force should the protests be per-

ceived as endangering its survival. The rising death toll during the second week of demonstrations indicates that security forces have already begun moving in this direction.

Even if the current wave of protests subsides, the likelihood of their renewed eruption remains high, given the persistence of their root causes — most notably the rejection of meaningful reform, the continuation of sanctions and the unresolved nuclear crisis.

Iran Restructures Its Ranks and Military Capabilities Amid Fears of Renewed War

The 12-Day War dealt a heavy blow to Iran's military leadership and revealed vulnerabilities in its conventional firepower, though its missile systems and stockpiles remained intact. The conflict also resulted in the deaths of eight senior commanders, holding ranks from brigadier general to lieutenant general. In mid-December 2025, Tehran responded by reshuffling its military leadership, appointing mostly Iran-Iraq War veterans, in preparation for anticipated Israeli and US threats. Simultaneously, Iran conducted military exercises emphasizing its missile capabilities, alongside threats of a severe response to any future attacks.

This file addresses three core topics: the recent leadership appointments within Iran's military, military exercises involving missiles, boats and drones and the expansion of Russian-Iranian military cooperation.

New Military Appointments

Iranian Army Commander Major General Amir Hatami has made several key leadership appointments in the wake of recent threats and military losses. He named Brigadier General Alireza Sabahi

Fard as his deputy for air defense affairs; Sabahi Fard previously commanded the Khatam al-Anbiya Air Defense Headquarters and the army's Air Defense Force. Brigadier General Alireza Elhami now succeeds him in that role, having previously led Iran's air defense during the Iran-Israel war.⁽³⁾ Notably, the Khatam al-Anbiya Joint Air Defense Headquarters — which coordinates air defense across the armed forces — is distinct from the Khatam al-Anbiya Central Headquarters, which manages all branches under the General Staff.

Major General Hatami, who served as defense minister from 2013 to 2021, became commander of the Iranian army on June 13, 2025, following the promotion of Major General Abdolrahim Mousavi to chief of staff after the assassination of the previous Chief of Staff Major General Mohammad Bagheri. Other appointments include Brigadier General Bahman Bahmarad as commander of the air force, succeeding Brigadier General Hamid Vahedi, who now serves as Hatami's aviation advisor. Brigadier General Ali Jahanshahi, formerly deputy head of evaluation at Khatam al-Anbiya Central Headquarters, was named commander of the army's ground forces. Brigadier General Kioumars Heidari was transferred to the Khatam al-Anbiya Central Headquarters as deputy to Major General Ali Abdollahi of the Islamic Revolutionary Guard Corps (IRGC), who now leads the headquarters following the killings of Major General Gholam Ali Rashid and Major General Ali Shadmani in Israeli attacks.

This latest cohort of commanders is noted for their significant operational experience and deliberately low media profiles.

Military Drills as a Show of Force and Defiance of Isolation

On December 5, 2025, Iran conducted a major military exercise in the Arabian Gulf, dubbed Eghtedar-99, marking its second large-scale drill since the 12-Day War and showcasing growing confidence in its missile capabilities. During the exercise, the IRGC Navy fired ballistic and cruise missiles at simulated targets near the occupied Emirati islands (Abu Musa, Greater Tunb, Lesser Tunb and Sirri Island). The drills featured a variety of missile systems, including the previously unknown 303 ballistic missile, alongside drone swarms, fast attack craft and short-range air defense systems such as Nawab, Majid and Misagh.⁽⁴⁾

According to Israeli officials, Iran's missile facilities suffered less damage than previously assessed and have since been rebuilt with assistance from allies such as North Korea, Russia and China. This recovery has allowed Iran to resume missile production and expand its arsenal, now estimated at over 2,000 missiles, strengthening its deterrent capabilities even without a nuclear program.⁽⁵⁾

In response to criticisms from the Gulf Cooperation Council (GCC) over Iran's "escalatory stances"⁽⁶⁾ and territorial claims, Iran hosted a joint military exercise with members and observers of the Shanghai Cooperation Organization (SCO), including China, Russia and several Middle Eastern states, signaling both strength and defiance against regional isolation.

Increased Russo-Iranian Military Cooperation

Leaked Russian documents from September 2025 indicate that Iran is set to receive 16 Su-35 fighter jets between 2026 and 2027.⁽⁷⁾ The aircraft are export-ready,

featuring English labels and newly manufactured parts. If finalized, this deal would substantially enhance Iran's air power and increase its regional influence.

Iran's military cooperation with Russia extends beyond aircraft to radars, missile systems and air defense capabilities. The upcoming delivery of Su-35 fighter jets could potentially challenge Israeli air superiority. On December 28, 2025, Iran also launched three reconnaissance and surveillance satellites in collaboration with Russia.⁽⁸⁾

As regional security dynamics evolve, Iranian military developments merit close monitoring. Recent reports suggest military cargo flights from Belarus and Russia may have transported air defense batteries to Iran, though the exact nature of these shipments remains unconfirmed.

Conclusion

Amid renewed domestic protests and ongoing threats from Israel and the United States, Iran is restructuring its military leadership to prepare for potential developments. With its nuclear program remaining outside IAEA supervision, Tehran anticipates possible attacks on its military sites and leadership. The recent maneuvers and reports of Iran's imminent acquisition of Russian Su-35 fighter jets appear aimed at strengthening defensive capabilities and sending a deterrent message to Washington and Tel Aviv, warning of the consequences of initiating a new conflict.

The Najaf Marjaya and the Fatwa on Government Salaries

The Iranian establishment is no longer merely contending with a decline in its political and military influence under sustained US and Israeli pressure, as well as

ongoing economic and political challenges; its religious authority is also increasingly contested, including the dominance of the Guardianship of the Islamic Jurist (Wilayat al-Faqih) over the broader Shiite religious sphere. It is within this context that the fatwa issued by Iraq's Grand Ayatollah Ali al-Sistani has emerged, signaling an effort at differentiation and strategic repositioning. This fatwa cannot be understood in isolation from the current political and social dynamics in Iraq and the wider region; it also reflects the sentiments of Shiite communities disaffected by Tehran's policies, particularly among those not aligned with the Guardianship of the Islamic Jurist. This file examines the fatwa through two themes: its stated purpose and objectives and the broader debate it has sparked over independence versus subservience.

The Fatwa's Purpose and Objectives

Sistani was directly asked about the ruling on praying behind imams who receive government salaries. His response was widely interpreted as a critique of Qom in favor of Najaf: "We advise the believers not to pray behind anyone who receives a government salary. This is not intended as a criticism of the individual or a question of their integrity, but rather to ensure that these positions and the stances of their holders remain entirely free from any potential government influence, now and in the future."⁽⁹⁾ Undoubtedly, this fatwa carries both religious and political objectives. In terms of its religious significance, although some have claimed the fatwa is old in an attempt to diminish its impact, its very issuance triggered a storm of controversy. This may reflect a deliberate strategy by influential figures in Najaf to exert pressure on the Iranian authorities, whose interference in hawza

affairs has threatened its independence and undermined its historical tradition of remaining politically detached. Najaf perceives Tehran's policies toward the hawza as a fundamental shift, particularly in appropriating a core Shiite doctrinal principle — the concept of *intizar* or awaiting the reappearance of the Infallible Imam — as justification for establishing a just government. In practice, this principle has been co-opted in favor of the authority of the supreme leader, thereby encroaching on the religious legitimacy of the "Hidden Imam." This tension echoes the historical dispute between Grand Ayatollah al-Khoei and Khomeini, a conflict whose implications persist under the current leadership of Khamenei and Sistani. This raises a fundamental question regarding the fatwa: Did Sistani intend merely to emphasize the distinction between Najaf and Qom in terms of financial independence, thereby limiting the fatwa to religious matters — specifically prayer and mosque jurisprudence — without political implications? Or is the Najaf religious establishment genuinely seeking to resist Iran's repeated attempts to assert control over Najaf, using the fatwa to remind the public of Tehran's interference in the operation of Qom's seminaries, where clerics receive government salaries, in contrast to Najaf, which consistently asserts its independence? Alternatively, did the seminaries perceive a decline in public engagement and a shrinking follower base, due to clerics' involvement in politics and the diminishing influence of the Iranian model in the region following strategic setbacks, prompting Najaf to distance itself from Tehran's policies? Moreover, in an era marked by modernity, globalization and the rise of artificial intelligence — factors contributing to a broader decline in

religion and spirituality — Najaf appears intent on preserving its relevance and maintaining its position within these contemporary developments.

Conversely, Tehran appears to perceive the independent posture of Najaf as a direct challenge. In response, Iran is attempting to impose a *fait accompli* on the ground, bypassing philosophical, doctrinal or historical justification, thereby seeking to establish a new reality across key Shiite centers — Najaf, Qom, Mashhad and Samarra. Yet, such imposition alone cannot confer religious legitimacy. To compensate, Tehran relies on rhetoric emphasizing “fighting arrogance,” “confronting the West” and “authentic Muhammadan Islam,” among other slogans, aiming to reclaim authority within the Shiite community and obscure the issue of its diminishing independence. Iranian concerns remain acute, as supporters of Najaf persist in Qom, Mashhad, Tehran and the Fars region. Many of these individuals attribute the politicization of Shi’ism and the ideological entrenchment of the Guardianship of the Islamic Jurist to the setbacks experienced by Shiite Muslims in the region, and Tehran fears that Sistani’s fatwa not only addresses these followers but also legitimizes and amplifies their presence in Qom.

A final point concerns Najaf’s internal dynamics. The city appears to be consolidating its internal structure and sending a message to both influential local figures and the broader Shiite public, as well as to Iraqi and Arab audiences, that Najaf remains the original and autonomous center of Shiite authority. Unlike Tehran, which subordinates its seminaries and funds clerics to extend influence abroad, Najaf asserts its independence and preserves its core identity. This inter-

nal fortification is particularly significant in light of the rise of pro-Tehran factions in recent Iraqi elections, signaling Najaf’s determination to maintain its institutional and spiritual autonomy.

The Dialectic of Independence and Subordination

Najaf remains deeply concerned about a fate similar to that of Qom, which was effectively co-opted by the Iranian establishment and transformed into an instrument of state influence. For this reason, Najaf consistently emphasizes the issue of independence, viewing it as central to the identity of the *hawza* and its religious authorities. This stance has helped maintain Najaf’s positive reputation, even among Shiites in Qom and Iran. Mohammad Ali Ayazi, a member of the Assembly of Researchers and Teachers at the Qom Hawza, noted that Sistani’s fatwa emerges within a longstanding concern for the autonomy of the clergy and seminaries. He observed that while some imams may not receive fixed state salaries or annual gifts, their appointments or accreditation by government-affiliated bodies such as the Friday Prayer Committee effectively place them within an official system, curtailing their independence and influence — particularly during election periods, when mosques can be exploited for political propaganda.

Ayazi emphasized that state intervention in religious institutions is not a new phenomenon: “During Khomeini’s time, some imams criticized the interventions of institutions like the Basij, which issued military directives and influenced religious activity, harming people’s relationship with mosques.”⁽¹⁰⁾ He highlighted Sistani’s stature among Iranian Shiites, describing him as “one of the great religious authorities for Iranians, enjoying

widespread respect from both his followers and others, which gives him a unique ability to influence the spirituality of society.” Drawing historical parallels, Ayazi linked Sistani’s fatwa to the warnings of earlier Iranian religious figures, including the late Grand Ayatollah Hossein Ali Montazeri and Grand Ayatollah Mohammad Reza Golpayegani, who cautioned against state control over seminaries and the exploitation of their roles to serve state interests. They noted that such interference would undermine both the independence of the seminaries and public trust, leading to a decline in mosque attendance as people increasingly viewed them as government instruments. Najaf’s influence thus extends into Qom, and the emergence of pro-Iran factions in the recent Iraqi parliamentary elections, along with their growing presence in Baghdad, appears to have prompted Najaf to apply pressure on Tehran from within Qom itself. This contest between the two sides is likely to continue as long as the supreme leader maintains his vision of transnational authority over Shiite communities.

Conclusion

At a time when Iran is facing maximum pressure from the West and its regional proxies are suffering after significant US and Israeli strikes, Najaf appears to have seized the moment to exert pressure on Tehran through Sistani’s fatwa — particularly in light of the rise of Iran-backed militias in the recent Iraqi parliamentary elections. By issuing the fatwa, Najaf aimed to constrain Iranian influence and challenge Tehran’s authority directly in Qom, effectively extending its leverage beyond Iraqi borders. Iranian authorities are likely aware of this risk, especially following the surge of protests in Tehran at the end of December 2025, where the bazaar — a traditional supporter and historical financial backbone of the hawza — played a central role. Having been co-opted and nationalized by the establishment after the revolution, the bazaar’s involvement underscores the growing domestic pressure. In this broader context, Sistani’s fatwa functions as a strategic tool to pressure Tehran: encouraging a reduction in support for armed militias in Iraq, promoting their integration under state institutions and limiting Iranian interference in Najaf and its internal affairs.

IRAN-ARAB INTERACTIONS

Iran's interactions with several Arab countries witnessed a series of developments during November and December 2025. In Iraq, parliamentary elections were held on November 11, but divisions among the winning alliances in those elections prevented the formation of the new government. In Syria, and one year after the fall of Bashar al-Assad's regime, Iran began reshaping its on-ground presence by shifting to a less visible pattern and relying on local factions linked to the former regime. As for Yemen, it experienced during November and December a pivotal phase marked by political instability after the STC seized Hadramawt and Al-Mahrah. However, Arab coalition forces responded decisively to these developments. Meanwhile, the Houthi militia, which had raised the ceiling of escalatory rhetoric against Saudi Arabia in November, opted for a calculated de-escalation and close observation of the scene during December. We track Iranian-Arab interactions through the following three themes:

- The results of Iraq's 2025 elections and the government formation crisis
- A year after Assad's fall: Iran and Syria between field influence and domestic pressure
- Rapid developments redefining the Yemeni landscape

The Results of the 2025 Iraqi Elections and the Crisis of Forming a New Government

As the Middle East undergoes complex geopolitical conflicts and transformations that do not align with the interests of Iran and the axis on which it has traditionally relied to advance its expansionist strategy, Iraq is simultaneously facing a crisis in the formation of a new government following the results of its sixth parliamentary election, held on November 11, 2025. Against this backdrop, the file proceeds in three stages: first, it maps the Shiite, Sunni and Kurdish electoral alliances that contested the elections; second, it examines the election results and the respective shares secured by these alliances; and third, it analyzes the political implications of the outcomes and the factors contributing to the complexity of forming the next Iraqi government.

Map of Electoral Alliances

A close reading of the electoral alliance map reveals a clear strategic pattern: fragmentation⁽¹¹⁾ within sectarian and ethnic blocs, mirroring the dynamics⁽¹²⁾ observed in the 2018 and 2021 elections. This fragmentation extends not only across sectarian and ethnic lines but also within the groups themselves. Shiite forces have splintered into several major alliances,⁽¹³⁾ each comprising dozens of smaller groupings. Sunni forces have coalesced into four principal alliances, likewise, encompassing numerous smaller components, while Kurdish forces have divided into three main alliances. The following outlines the most salient features of this alliance landscape:

Multiplicity of Leadership Within the Pro-Iran Bloc:

In contrast to the 2021 elections — when Shiite alliances were divided into two

broad camps, a sectarian camp represented by the Coordination Framework and supportive of a militia-based state under the leadership of Maliki, and another advocating a national-state project led by Sadr — the 2025 elections mark the first instance of an intense political contest within the same sectarian camp. This contest split the pro-Iran camp into two rival groupings: one backing a second term for Sudani, and the other supporting a third term for Maliki. This fragmentation reflects the diminished effectiveness of Iran's management of Shiite alliances, particularly the absence of a unifying figure comparable to the late IRGC Commander Qassem Soleimani, which has further complicated the process of selecting a new prime minister.

A Shiite Struggle to Consolidate Authority in the Post-2025 Phase:

With Sadr absent from the political arena, Shiite alliances are no longer competing solely for parliamentary seats, as they did in the fourth and fifth electoral cycles. Instead, they are also vying to establish themselves among the dominant Shiite actors shaping Iraq's political order and to entrench their status as the primary centers of decision-making in the post-2025 period.

Independent Participation of Military Wings:

For the first time in nearly two decades, alliances linked to armed factions — such as Asa'ib Ahl al-Haq, the Badr Organization, Kata'ib Hezbollah and Kata'ib al-Imam Ali — contested the elections through separate alliances rather than under the umbrella of broader coalitions. This development signals a deepening rift within both the militia landscape and the alliance structure, as well as a deliberate effort by militia leaders to assert

themselves as autonomous political actors. Such positioning is intended to secure a stronger role in the next political phase, particularly in light of the waning influence of the Iranian sponsor and the militias' determination to safeguard their own interests.

Election Results and Quotas

First place: The Reconstruction and Development Coalition emerged with 46 seats out of 329. This outcome is attributed to its success in appealing to the previously disengaged electorate, its sustained efforts to alleviate service-related crises and its adoption of a pragmatic and rational discourse centered on safeguarding state interests. The bloc benefits from a broad spectrum of domestic backing, including influential military figures such as Falih al-Fayyad, Hadi al-Amiri and Qais al-Khazali; political leaders such as Ammar al-Hakim and Haider al-Abadi; figures associated with liberal currents, including Iyad Allawi; as well as ministerial and parliamentary figures such as Labor Minister Ahmed al-Asadi and Communications Minister Hayam al-Yasiri. These factors position the bloc as a strong contender for a second term, although Maliki continues to pose a significant obstacle to this outcome.

Second place: The Progress Party secured 33 seats. This result reflects the perception of its leader, Mohammed al-Halbousi, as a consensus-oriented Sunni figure who embraces a moderate, institutional approach and a balanced political strategy. These characteristics have established him as a relatively civilian political leader with broad acceptability across the political spectrum. Consequently, the party enjoys substantial Sunni support, extending beyond traditionally Sunni provinces.

Third place: The State of Law Coalition ranked third with 28 seats. Maliki retains notable influence and popularity in the southern provinces, largely due to his association with hardline currents. He commands an extensive network of influence within state institutions and maintains leverage over uncontrolled armed elements capable of destabilizing the political environment. His position is reinforced by the support of four sitting ministers — Oil Minister Hayyan Abdul Ghani, Electricity Minister Ziad Ali Fadhil, Youth and Sports Minister Ahmed al-Mubarga and Agriculture Minister Abbas al-Ulayawi — alongside dozens of current and former members of Parliament.

Fourth place: The Sadiqun List won 27 seats, marking a significant rise compared to previous electoral cycles: an increase of 12 seats over the 2021 elections, 17 over 2018, and 26 over 2014. This steady upward trajectory reflects consistent growth in the bloc's parliamentary representation. The gains are largely attributable to the position of Asa'ib Ahl al-Haq, which, having developed locally relative to other militias, occupies influential roles within the Popular Mobilization Forces (PMF). This presence enables it to shape voter behavior, including among PMF members and their families. In addition, Khazali demonstrates a clear inclination toward political engagement as a pathway to power, distinguishing him from militia leaders who prioritize militarization. He also exercises a degree of autonomy from Iran in decision-making and maintains constructive relations with the government.

Fifth place: The Kurdistan Democratic Party (KDP) secured 26 seats. This result reflects the growing public dissatisfaction in Erbil and Duhok, driven by percep-

tions of weak economic management and poor service delivery under the KDP-affiliated government led by Masrour Barzani, which negatively affected the party's electoral performance.

Remaining positions: The National State Forces Alliance and the Badr Organization tied for sixth place, each securing 18 seats. This result places the Badr Organization among the militias that gained parliamentary representation, alongside Asa'ib Ahl al-Haq (27 seats), Kata'ib al-Imam Ali (9 seats) and Kata'ib Hezbollah (6 seats). Its alliance with Maliki further complicated the process of forming a new government, as it strengthened Maliki's control over the so-called blocking third (110 seats), effectively giving him the leverage to hinder government formation.

Losing positions: Civilian alliances, led by Adnan al-Zurfi's Albadil Alliance, despite enjoying significant influence and recognition within Iraq's political landscape, suffered from limited penetration in tribal and rural areas and a comparatively weak presence in urban centers relative to established traditional alliances. These factors substantially undermined their electoral prospects.

Significations of the Parliamentary Election Results

1-High voter turnout: Voter participation reached 56.11%,⁽¹⁴⁾ a significant increase from the 43% recorded in 2021, and came as a major surprise. This surge is attributed in part to Prime Minister Sudani's perceived performance, which motivated previously disengaged voters to participate. Additionally, many alliances focused on introducing new, popular candidates in place of familiar figures, enhancing mobilization efforts. Campaign strategies also shifted from emphasizing

sectarian affiliation to leveraging financial incentives, with votes effectively categorized as "diamond," "gold," or "silver" based on the amount paid. Vote prices reportedly reached up to 700,000 dinars (approximately \$500),⁽¹⁵⁾ depending on the candidate's prominence.

2-Military precedence over civilian alliances: Militias captured roughly 60 parliamentary seats, while most civilian alliances failed to secure representation, with the exception of the Alternative Alliance, which won four seats. This outcome consolidates the militias' influence in the new Parliament, potentially facilitating the passage of more sectarian legislation, including the stalled amendment to the PMF Law, and complicating US efforts to limit the proliferation of weapons outside state control.

3- A repeat of the 2021 scenario: The electoral outcome mirrors the 2021 dynamic between Maliki and Sadr, now reflected in the competition between Maliki and Sudani, as neither bloc achieved a clear majority to claim the largest share of seats. However, the next phase is expected to feature greater US influence than in previous years, driven by efforts to recalibrate Iraq's internal balance of power in light of regional developments that have weakened Iran and forced it to adopt a more restrained posture. US statements and reports indicate that the Trump administration aims to exert political and military leverage in Iraq, potentially affecting militia leaders, as Iraq remains one of the few arenas where a new regional equation is still unfolding.

Conclusion

The foregoing shows a narrow margin of seats between the blocs of Sudani and Maliki, highlighting the complexity of forming a new government through the end of

December 2025. While Sudani's bloc won the most seats, this does not guarantee government formation, especially given that the Coordination Framework — the largest bloc — has positioned itself to block his efforts, replicating the strategy it employed against Sadr after the 2021 elections. At that time, Sadr secured 73 seats, significantly more than Sudani's 46, yet was unable to form a government because the Coordination Framework exercised its blocking third. A similar scenario could now unfold against Sudani. The close balance between the winning forces means that no side can form a government without broad consensus, particularly as the US administration emphasizes the need for a new Iraqi political equation free from uncontrolled weapons. This insistence further complicates and potentially prolongs the government formation process. However, strong US pressure on the militia-dominated state, using its political and military leverage, could accelerate the formation of a government, whether led by Sudani or by any consensus candidate acceptable to Washington.

Iran's strategic priorities explain its firm stance in maintaining influence over Iraq, particularly in the aftermath of its regional setbacks. Iraq occupies a unique position for Iran due to its geographical proximity and centrality in Tehran's regional strategy. Iran is aware that a new Iraqi government not aligned with its interests — especially one that asserts state control over weapons — would deepen its regional vulnerabilities. Yet, the combination of domestic challenges and the potential long-term consequences of

confrontation may compel Iran to accept limited concessions in Iraq, including compromises on the formation of the new government, the role of the PMF and the regulation of weapons, in response to the intensity of US pressure.

A Year Since Assad's Fall: Iran and Syria Between Clout on the Ground and Internal Pressure

A year after the fall of Bashar al-Assad's regime, Iran's presence in Syria is no longer framed as a conventional ally-state relationship. Instead, it has entered a phase of forced recalibration within a highly fragile political and security environment. Throughout November and December 2025, Iranian media and political statements increasingly reflected the recognition that Assad's fall was more than a personal or symbolic loss; it marked a turning point in the traditional system of influence Tehran had cultivated within Syria over more than a decade.

In this context, Iran's engagement in Syria is no longer managed as a stable strategic extension. Rather, the country has become an arena for testing Tehran's ability to navigate a new authority, distinct from the previous regime, amid a regional environment characterized by intensified US and Israeli pressure and a shrinking margin for maneuver against hard-power tools.

This file examines three key themes: first, how the Iranian press interprets the Syrian landscape one year after Assad's fall; second, the shift from direct influence to managing controlled chaos within Syrian territory; and third, the internal implications for Iran, highlighting Syria as an emerging political burden.

Iranian Press Analysis on Syria One Year After Assad's Fall

A year after Assad's fall, Iranian media largely depicted post-Assad Syria as a state with incomplete sovereignty, marked by institutional fragility and unresolved social divisions. Notably, this coverage did more than describe the Syrian crisis; it implicitly reassessed Tehran's previous policies.⁽¹⁶⁾ It signaled recognition that the tools effective under a centralized, authoritarian regime were now inadequate under a new authority pursuing a more balanced foreign policy. A relative consensus also emerged that sustaining Iranian influence would depend on redefining its instruments rather than expanding them. Consequently, the media served not merely to report on Syria but to shape Iranian public perception, preparing it to accept that Syria was no longer a guaranteed sphere of influence but an arena of open contestation involving multiple regional and international actors.

In this context, reports from December 2025 highlighting Iranian efforts to reactivate remnants of the Fourth Regiment⁽¹⁷⁾ under former regime leaders illustrate a shift in Tehran's approach — from treating Syria as an allied state to managing mobile networks. This reflects the conviction that influence can no longer be exercised through the official institutions of the new Syrian state but must operate through shadow forces functioning within the security and political vacuums left by the previous regime's collapse.

From Direct Influence to Controlled Chaos Management Within Syrian Territory

Based on this media and political assessment, developments in November and December 2025 indicate that Iran

had begun reshaping its on-the-ground presence in Syria. Moving away from a large-scale, overt military footprint, Tehran shifted to a subtler form of influence, leveraging local factions and networks connected to the former regime, including Saraya al-Jawad and the Coastal Shield Brigade.⁽¹⁸⁾ The objective was not to regain full control but to preserve a state of security fluidity and instability. Under this approach, Iran's goal was not a decisive victory but to prevent Syria from stabilizing in a manner that could curtail its influence. This strategy was particularly evident along the Syrian coast, where efforts to reorganize remnants of the old regime coincided with rising sectarian tensions following the bombing of the Ali Mosque in Homs, creating conditions favorable for reactivating old networks under the guise of chaos.

A strategic reading of Iranian behavior suggests that the Syrian coast is viewed as a sensitive area, given its porous social fabric, proximity to smuggling routes and seaports and the potential for any security disturbance to send a political signal beyond its borders. Reports have circulated of potential coordination between armed cells in Tartus and entities linked to Iran, including the sharing of equipment, weapons, communications and safe houses, understood as an effort to safeguard Iran's logistical infrastructure in Syria.

Importantly, this activity is inseparable from the broader regional dimension. Tehran uses these networks as a tool of indirect leverage: to mitigate US pressure in Iraq, to send warnings regarding Hezbollah's disarmament debate and to keep the Syrian front open as a destabilizing factor against Israel. In this way, Iranian influence in Syria is evolving from an expansionist agenda into a bargaining

instrument, balancing the capacity for disruption with the ability to negotiate de-escalation.

Domestic Repercussions: Syria as a Political Burden Within Iran

This external shift coincided with significant internal developments, notably the widespread protests that erupted in Iran on December 28, 2015. While these protests were triggered by economic and social grievances, Iran's ongoing involvement in Syria after Assad's fall amplified public frustration. Protesters' slogans increasingly reflected discontent over the deployment of Iranian resources in foreign arenas viewed as losing schemes or lacking tangible political gains. Analyzing media coverage and social media discourse reveals a growing perception that regional interventions are directly linked to domestic hardship, with foreign entanglements partly blamed for economic decline. Consequently, Syria is no longer merely an external theater of influence; it has become a source of internal pressure that constrains Tehran's strategic flexibility and makes any external escalation both politically and socially costly.

Conclusion

An analysis of Iranian behavior during November and December 2025 indicates that Tehran has transitioned from defending a loyal ally to managing a fragile sphere of influence in a challenging environment. The aim is no longer to assert full control but to prevent total loss by relying on flexible networks capable of exerting pressure and carrying out disruptive actions without engaging in direct confrontation. Yet, this strategy, while providing some regional maneuverability, carries significant risks. It intersects with escalating domestic pressures that

constrain Iran's capacity to sustain external influence, making its future role in Syria dependent on its ability to balance the management of controlled chaos with the growing costs of attrition.

Accelerating Developments Reshaping the Landscape in Yemen

During November-December 2025, Yemen entered a critical phase of political instability, particularly in the south. The STC, led by Aidarus al-Zubaidi, executed a coup against the internationally recognized government, mobilizing forces to seize control of the eastern governorates of Hadramawt and Al-Mahrah. This left the legitimate government confronting two separatist threats: the Houthis in the north and the STC in the south.

Saudi Arabia intervened decisively, demonstrating its commitment to supporting the government and maintaining Yemeni unity, effectively containing the southern unrest. Meanwhile, the Houthis adopted a cautious, de-escalatory approach, observing the evolving situation before acting, reflecting a pragmatic strategy aligned with Iranian interests.

Accordingly, this file discusses the STC coup and the decisive Saudi stance, and the Houthi de-escalation and strategic anticipation.

The STC Coup and the Decisive Saudi Stance

During November-December 2025, the STC gradually escalated its actions, culminating in a coup against the internationally recognized Yemeni government. In early December, the STC seized control of the Hadramawt and Al-Mahrah governorates, a clear violation of the Presidential Leadership Council (PLC) agreements and Yemen's Constitution. This move threatened the unity and cohesion

of all factions aligned with the legitimate government, diverting them from their shared anti-Houthi stance, which remains the primary threat to Yemen's security and stability.

In response, the legitimate government and the Saudi-led Arab coalition took a firm stance. Yemen canceled its joint defense agreement with the UAE and demanded the immediate withdrawal of Emirati forces within 24 hours, citing their involvement in supporting the STC coup. Saudi Arabia reiterated its full support for the legitimate government, expressing regret over the UAE's role in pressuring the STC to mobilize its forces. In a statement on December 30, 2025, the Saudi Ministry of Foreign Affairs condemned any escalation threatening Saudi national security via Yemeni territory, emphasized the historical and social legitimacy of the southern cause and affirmed that comprehensive political dialogue, not military force, is the proper means to resolve the issue.⁽¹⁹⁾

As a result of ongoing threats and evidence of attempts to supply the STC with weapons and equipment, the Saudi-led coalition targeted two ships in the Port of Mukalla. These vessels, arriving from Fujairah, were intended to deliver arms to the rebel forces. The operation was precise, causing no casualties among civilians or port workers and inflicting no damage to port infrastructure. Through coordinated efforts between the coalition, the Homeland Shield Forces, and other military formations aligned with the legitimate government, the government regained control over all areas previously held by STC militias and established security measures to prevent chaos in Aden. Supported by the Arab coalition, the legitimate government also restructured the alliance of all political

components within its ranks, preventing any separatist projects outside the Yemeni state framework. Consequently, Yemen now enjoys a more cohesive political landscape, with unified strategic visions and coordinated political approaches to confront the Houthi threat in the north.

Houthi De-escalation and Strategic Anticipation

Amid the turmoil in southern Yemen, the Houthi militias adopted a strategy of de-escalation and calculated anticipation during November and December 2025, particularly in December, following heightened rhetoric and threats against Saudi Arabia in November. This indicates that the Houthis are pursuing their coup and escalation objectives within Yemen through a strategic framework rooted in anticipation and pragmatic calculations, especially regarding regional dynamics and Iranian orientations. Houthi policy aligns with a broader regional strategy that serves Iranian interests, meaning that all Houthi moves —whether de-escalatory or escalatory— are tools Iran can leverage politically and in negotiations amid regional political and military fluctuations. Consequently, the combination of calculated escalation on some fronts and de-escalation on others remains a defining feature of Iran's strategy to strengthen Houthi influence in Yemen.⁽²⁰⁾

The Houthi truce also seeks to preserve political and military gains and consolidate their presence inside Yemen, making the Houthis a threat to regional security and international navigation, as well as the primary obstacle to Yemen's security and stability. This assessment was reinforced by the international community through the UN Security Council resolution of November 14, 2025, which renewed sanctions on the Houthis — in-

cluding the arms embargo, travel restrictions on certain Houthi leaders and the freezing of their assets — for another year, particularly given their readiness to resume military operations in response to regional and international developments.⁽²¹⁾

Conclusion

The events in Yemen during November and December 2025 demonstrated that the legitimate government faced complex challenges and tactics with varied regional dimensions aimed at under-

mining its authority and imposing new agendas on the Yemeni reality. The STC's coup represented a direct challenge to the government. However, the decisive stance of Saudi Arabia restored order and established a new course that strengthened the cohesion of all legitimate Yemeni components. This position enabled the government to extend its influence across Yemeni territories and prepare to confront the Houthi threat, who remain cautiously observing the evolving situation in Yemen.

Iran's Relations With International Powers and Future Prospects

Iran's relations with Western powers revolve around President Donald Trump's threats to Tehran that he would support an Israeli attack on Iran if it rebuilt its nuclear capabilities or advanced its missile programs. Although Iran has repeatedly declared its readiness to return to the nuclear negotiating table with the United States, it rejects negotiations under US pressure and coercion, and it appears to be betting on time to avoid offering major concessions in what it considers issues tied to sovereignty and national dignity.

Will Trump Back a New Attack on Iran?

On December 28, 2025, US President Donald Trump issued a stark warning to the Iranian leadership, declaring that he would support an Israeli strike on Iran if it resumed its nuclear program or advanced its missile capabilities. The statement came just before his scheduled meeting with Israeli Prime Minister Benjamin Netanyahu in the United States. Given Trump's unpredictable policy style and assertive stance on international affairs, combined with ongoing Israeli threats and persistent concerns over Iran's nuclear and missile activities, the possibility of him acting on this threat cannot be dismissed. This file examines the background and motivations behind Trump's warning, Iran's likely response and the question of whether the United States would actually endorse such an attack, providing insight into the current dynamics of US-Iran relations.

Trump's Threat

Trump's warning is not without precedent, but its timing is notable: it was issued just before Netanyahu's meeting with Trump and came amid a prolonged stalemate in US-Iranian diplomacy since the Israeli-US strike on Iran in June 2025 — known as the 12-Day War. This deadlock reflects a significant gap between the two sides, preventing a return to negotiations. Iran's confidence in diplomacy has been severely shaken since the conflict, while US demands cross Tehran's established red lines, including calls for Iran to halt uranium enrichment and to expand negotiations to encompass additional issues.

US concerns are further heightened by uncertainty over Iran's current enriched uranium stockpiles and the extent of damage inflicted on its nuclear facilities

during the strikes. Iran's policy of nuclear secrecy and restrictions on IAEA inspections — particularly regarding damaged sites and the status of enriched uranium — fuel suspicions about Tehran's nuclear intentions. At the same time, reports suggest Iran is actively rebuilding its missile program, damaged during the war, either independently or with Chinese and Russian assistance, in preparation for a potential Israeli-US campaign. Washington and Tel Aviv fear that if this moment of weakness is missed, Iran could bolster its deterrent capabilities and complicate any decisive strike in the future.

Despite mounting US pressure, sanctions and serious internal challenges that threaten its survival, the Iranian regime has maintained its hardline positions, showing no sign of acquiescing to Washington's demands and continuing policies that the United States views as belligerent.

Iran's Hardline Stance

Although Iran has repeatedly expressed its willingness to resume nuclear negotiations with the United States, it refuses to engage under US pressure or coercion, insisting on its own conditions. Tehran is effectively buying time to avoid making concessions on issues it considers central to national sovereignty and dignity. The Iranian establishment does not oppose negotiations in principle but insists that they be balanced, free of preconditions or dictates.

Iranian Foreign Minister Abbas Araghchi articulated this stance, affirming that Tehran remains open to talks with the United States provided they are founded on "mutual respect and shared interests," while also signaling preparedness for conflict if Washington opts for that route. Araghchi later underscored Iran's posi-

tion in an article for *The Guardian*, titled: “You’ll Never Defeat us in Iran, President Trump, but With Serious Negotiations, We Can all Achieve Victory,” reflecting Tehran’s readiness to pursue either diplomacy or confrontation depending on the circumstances.⁽²²⁾

Indeed, Iran has responded to the US threat with a reciprocal warning. Ali Shamkhani, a senior advisor to Supreme Leader Ali Khamenei, stated on X: “Iran’s missile and defense capabilities cannot be contained and do not require permission, and any act of aggression will be met with a harsh and immediate response that exceeds the imagination of its planners.” This declaration underscores Iran’s increasingly hardened stance toward US threats and aligns with its dual-track policy since the end of the war, combining measured flexibility with firm resistance to counter ongoing US pressure.⁽²³⁾

It is notable that on December 28, 2025 — the same day as Trump’s statement — Iran announced the launch of three satellites in cooperation with Russia. Western observers interpret these space tests as a cover for advancing Iran’s ballistic missile program. The launches signal Tehran’s determination to continue developing its missile capabilities despite

US threats. They also indicate that Iran’s partnerships with Russia and China — reportedly helping to revive its missile program — remain effective, reinforcing Tehran’s position within a broader alliance countering US hegemony.⁽²⁴⁾

Conclusion

The US president and his administration may have felt a sense of relief following the strikes on Iran’s nuclear facilities and the disruption of its nuclear program. Trump’s threat could be seen as consistent with his typical behavior, or perhaps as a preemptive signal ahead of Netanyahu’s visit and might not necessarily be taken at face value. Yet, the ongoing uncertainty and Iran’s hardline stance could prompt Trump to act on his warning and support an Israeli military operation against Iran. This is reinforced by Tehran’s continued stalling on negotiations, its rejection of US conditions and its pursuit of nuclear ambiguity while developing capabilities to deter potential attacks. At the same time, Israel is pressuring Washington to exploit Iran’s complex situation, including the current wave of domestic protests. Decades of sanctions and pressure alone have proven insufficient to alter the establishment’s behavior, further complicating US calculations.

Endnotes

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