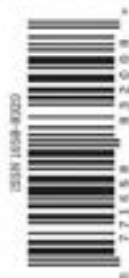


MONTHLY REPORT

# Iran Case File

**January 2026**

*Your window on Iran from inside and abroad*





MONTHLY REPORT



# Iran Case File

January 2026

ISSN 1658 - 8320

WWW.RASANAHIIS.ORG

Rasanah\_iis

info@rasanahiis.com

+966.112.166696

---

All rights reserved. No part of this publication may be reproduced, distributed or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of Rasanah.

# Contents

<b>EXECUTIVE SUMMARY .....</b>	<b>4</b>
<b>Domestic Developments .....</b>	<b>6</b>
The Protests' Impact on the Iranian Economy and Future Scenarios.....	7
Macroeconomic Indicators .....	7
Microeconomic and Market Indicators.....	8
Future Scenarios.....	8
Conclusion .....	9
Iran Facing a Storm of Crises and Military Challenges .....	9
Sale of Light Weapons via Cryptocurrencies.....	10
Europe Takes Aim at the IRGC.....	10
Conclusion .....	11
The Middle Class and Stability in Iran .....	11
Bazaar Protests and the Erosion of the Middle Class .....	12
Middle Class Demands and the Establishment's Containment Tactics .....	12
Conclusion .....	13
The Hawza and the Iranian Protests .....	13
Khamenei's Messages in Qom .....	14
Hawza Divisions .....	14
Conclusion .....	15
<b>Regional Interactions .....</b>	<b>18</b>
Key Outcomes of Savaya's Mission and the Formation of Iraq's New Government .....	19
Factors Governing the Future of Savaya's Mission .....	19
The Potential Designation of Maliki as the New Premier.....	20
Conclusion .....	21
The Israeli Factor in Iranian Confrontations and the Prospects of War .....	21
Israeli Calls for Insurrection.....	21
The Israeli Factor in the Potential War .....	22
Conclusion .....	23
<b>Iran and the United States .....</b>	<b>24</b>
US Military Consolidation to Impose a New Reality in Iran .....	25
The US Military Threat.....	25
Iran Prepares for Confrontation .....	25
A Deal or War?.....	26
Conclusion .....	26

## EXECUTIVE SUMMARY

The Iran Case File (ICF) for January 2026 outlines the most significant developments across domestic and international spheres during the month. Domestically, it covers economic, military and socio-intellectual trends. Externally, it examines Iran's interactions with Arab and regional states, including neighboring Iraq and arch foe Israel, as well as its international relations particularly with the United States.

On the economic front, nationwide protests in January 2026 were not isolated political events but acted as a direct economic shock that amplified existing imbalances. The turmoil quickly affected the macroeconomy, triggering a deteriorating exchange rate, soaring inflation reaching 60% year-on-year and downward revisions in growth forecasts. The microeconomy also suffered through market disruptions, contraction in commercial activity and setbacks in the digital economy caused by internet shutdowns. These pressures eroded purchasing power, reduced living standards, created shortages and drove sharp price increases.

According to the ICF, the trajectory of the Iranian economy in 2026 could follow one of three paths: partial containment with gradual economic deterioration as the most likely scenario, a rapid economic recovery contingent on the lifting of sanctions as a less probable outcome, or an escalation of protests leading to a loss of economic control as a possible risk.

On the military front, Iran has reportedly begun offering some of its weapons — including ballistic missiles, drones and warships — to foreign governments in exchange for cryptocurrencies. This strategy aims to bypass sanctions and financial restrictions imposed by the United States and European nations. In response, the European Union added the Islamic Revolutionary Guard Corps (IRGC) to its list of foreign terrorist entities, prompting Tehran to adopt reciprocal measures.

Socially, Iranian society has experienced profound structural changes in recent years. The middle class has nearly vanished, with official data indicating an annual shrinkage of roughly 11%, bringing many families close to the poverty line. This segment, with its expectations rooted in skills and societal contributions, has become increasingly vocal in protests. The establishment has alternated between repression and dialogue, particularly during demonstrations in which the middle class played a central role.

Ideologically, heightened US pressure and threats against Iran, including potential strikes or the assassination of Supreme Leader Ali Khamenei, have influenced public and religious spheres. Khamenei appeared publicly in Qom, addressing residents without the presence of other seminary authorities. Analysts interpreted this as a layered message to the international community, demonstrating he is not in hiding; to the Iranian public, showing he continues to exercise leadership; and to the seminaries, reaffirming his supreme religious authority.

To reinforce this position, the establishment has coordinated with loyalist religious figures abroad to publicly declare allegiance to Khamenei, the revolution and the state. This move signals to the West that while some policies may provoke concern, the supreme leader's continued influence over loyalist Shiites worldwide may ultimately stabilize Iran and thereby safeguard Western interests.

Iran's foreign relations with the Arab world and regional states saw notable developments during January. On the Iraqi front, two key issues shaped the landscape. First, the future of US Special Envoy Mark Savaya remains uncertain amid challenges posed by Iraq's complex militia dynamics, his lim-

ited diplomatic experience and the insistence of Nouri al-Maliki's coalition on forming a new government. Second, the deadlock in forming a new Iraqi government persists, following President Donald Trump's veto of Maliki and threats of further action if he came to power. Iran appears to be leveraging Maliki as a bargaining tool in its conflict with the United States, creating multiple possible outcomes: Maliki's withdrawal and the nomination of a consensus candidate, Sudani's extension for a third term or the continuation of his current term until resolution.

In the context of the January unrest, Israeli and US support for the Iranian protests and the looming threat of strikes against Iran prompted the establishment to adopt a security-heavy approach while mobilizing domestic support. Though Israel avoided direct military threats, it signaled tacit support for US measures. Analysts suggest that the current regional posture and efforts to avert war and establish dialogue mean that in a potential conflict Israel would likely be the primary target for Iranian missiles, explaining the cautious posture of its leadership. The government in Tel Aviv faces a strategic dilemma: a desire to weaken the Iranian establishment versus fears of domestic and regional costs amid deteriorating internal conditions since October 2023.

On the international front, US-Iran relations entered a heightened phase of tension. US threats of military action or regime change coincide with Tehran's refusal to comply with Washington's broader conditions beyond the nuclear agreement. While diplomatic gaps remain, the risk of conflict continues, particularly as Israel opposes any US-Iranian understanding and seeks opportunities to effect a radical shift in Iran as part of a broader strategy to reshape regional dynamics in its favor.

## **Domestic Developments**

In January 2026, Iran saw developments unfold across the economic, military, social and ideological spheres, each shaping the broader national landscape as explored in the following files.



## The Protests' Impact on the Iranian Economy and Future Scenarios

The Iranian economy experienced a surge of social unrest alongside economically motivated protests, set against the backdrop of persistent structural imbalances, including high inflation, a sharp depreciation of the national currency, weak economic growth, constrained foreign exchange reserves and the devastating impact of seven years of economic sanctions. These demonstrations affected a broad range of macroeconomic and microeconomic indicators during January 2026. Accordingly, this file analyzes these effects in three sections: first, the impact of the protests on macroeconomic indicators; second, their consequences for the microeconomy and domestic markets; and third, potential scenarios for the Iranian economy in light of ongoing developments.

### Macroeconomic Indicators

Recent developments in January significantly affected several macroeconomic indicators, including exchange rates, inflation and fiscal policy aimed at addressing the budget deficit.

*Exchange Rate:* Currency fluctuations proved the fastest channel for transmitting instability to the broader economy. The US dollar exchange rate rose from approximately 130,000 toman in mid-December 2025 to nearly 160,000 toman by the end of January 2026, a 23% increase in just six weeks. This surge reflected multiple factors: escalating domestic protests, the US military buildup against Iran, government-imposed high dollar rates for imports and fears of runaway inflation. Together, these dynamics transformed exchange rate volatility into a direct driver of inflation.

*Inflation:* Annual inflation in January reached roughly 44.6%, while point-to-point inflation — the change from January 2025 to January 2026 — hit 60%, its highest level in decades. Food prices surged by over 89% year-on-year. These figures indicate a shift from inflation driven purely by economic factors to inflation increasingly shaped by political risks and negative expectations. Anticipation of shortages or further price increases led market participants to adjust prices and currency valuations pessimistically, further fueling current inflationary pressures.

*The Risk of Stagflation:* Iran faces the simultaneous challenge of high inflation and stagnant economic growth, which was estimated at 0.6% in 2025<sup>(1)</sup> and may turn negative in the first quarter of 2016. Oil continues to be the primary driver of growth and the main source of government revenue. However, the recent tightening of external sanctions, coupled with declining oil exports and lower international oil prices, heightens the risk of stagflation. This scenario poses a significant dilemma for economic policymakers, as the tools required to combat inflation differ from those needed to stimulate growth. Efforts to address one issue may exacerbate the other, potentially leading to deeper recession, fiscal austerity and rising unemployment.

*Austerity Measures to Address the Budget Deficit:* The government was compelled to implement austerity measures to contain the rapidly growing budget deficit, amid a shortage of financial resources from its primary revenue source, oil. As part of these measures, the authorities raised the dollar exchange rate for importing certain essential goods to near market levels, between 120,000 toman and

130,000 tomans, after previously offering heavily subsidized rates of approximately 50,000 tomans to traders.

### **Microeconomic and Market Indicators**

At the micro level, the service and commercial sectors were among the hardest hit by disruptions. Markets, supply chains and the availability of goods and services were significantly affected, which in turn drove up prices. Protests and localized internet shutdowns caused near-total disruption of digital commerce, hindering international business transactions and forcing many shops to close. Direct losses from these internet outages were estimated at approximately \$27 million per day,<sup>(2)</sup> effectively paralyzing the digital economy.

Traders and small business owners also faced severe losses due to closures and security restrictions, which contributed to their active participation in the recent protests — a group historically central to major uprisings in Iran. Some members of the Chambers of Commerce warned that the country is losing market share in neighboring states, such as Iraq, due to internet outages.

Field reports highlighted shortages of basic goods as shops closed and authorities intervened, forcing traders to reopen or seizing their stores. These disruptions led to long queues for essential food items, including oil and eggs, while meat prices surged.<sup>(3)</sup> For instance, the price of chicken rose from 250,000 tomans per kilogram to 400,000 tomans, a 60% increase, and a liter of vegetable oil jumped from roughly 80,000 tomans two months ago to 217,000 tomans, a 170% increase.

The stock market was also affected, registering consecutive days of losses. Growing uncertainty and doubts about

the government's ability to manage successive shocks led investors to shift from equities to real assets and foreign currencies, driving up the prices of both foreign currencies and precious metals. These developments have widened the gap between the real economy and financial markets, limiting the latter's role as an effective source of economic financing.

Moreover, the erosion of confidence among consumers and investors negatively affects consumption and investment decisions, with direct implications for economic growth. This dynamic allows shocks to propagate from the microeconomic level to the broader macroeconomy, reinforcing a cycle of inflation fueled by future uncertainty, currency depreciation and declining growth.

### **Future Scenarios**

The Iranian economy faces heightened political uncertainty, sustained external pressures and intensified sanctions, all of which have deepened existing economic crises. These factors are expected to persist for several months, constraining the government's capacity to implement rapid and effective economic policies. Nevertheless, a longer-term correction remains possible if there is a breakthrough in both internal and external conditions affecting economic performance, alongside a genuine shift in current economic policies.

Three potential scenarios emerge:

*Scenario One: Rapid Economic Breakthrough:* This scenario appears unlikely in the near term. It would require bold economic measures to restore macroeconomic stability, control inflation and exchange rates, stimulate growth and rectify budgetary imbalances. It also depends on the lifting of international sanc-



tions — US, European and multilateral — a process that remains uncertain and contingent on the outcome of ongoing US-Iran negotiations. While lifting sanctions could generate optimism and halt the current economic devastation, long-term stability would require structural reforms across the economy and market mechanisms. Given weak global oil prices, the deep involvement of the IRGC in the economy and the risk of renewed conflict with the United States and Israel under Trump and Netanyahu, a rapid economic breakthrough remains highly improbable.

*Scenario Two: Escalating Protests and Loss of Economic Control:* This scenario appears likely given the resurgence of protests driven by persistent underlying issues, including the ongoing cost of living crisis, continued currency devaluation and rising prices. The failure of a nuclear agreement with the United States would further exacerbate macroeconomic pressures. In the event of US strikes, the economic situation could spiral out of control, triggering sharp increases in exchange rates and inflation, potentially undermining security and threatening the stability of the political system.

*Scenario Three: Partial Containment With Continued Economic Decline:* This scenario is the most probable. It depends on the establishment's ability to apply previous crisis-management strategies, including security measures and temporary economic concessions such as cash subsidies or salary increases. However, these measures do not address structural imbalances, including financial and political corruption, oil dependence and the weakness of the private sector.

As a result, gradual economic deterioration is likely to continue at both macro and micro levels, reflected in exchange rates, inflation and growth. The economy is expected to “coexist with the crisis,” eroding slowly but steadily until sanctions are lifted, at which point gradual recovery could occur, allowing the establishment temporary respite.

## Conclusion

The unrest and demonstrations of January 2026 were not simply a transient event but served as an accelerator of Iran's deepening economic crisis. The shocks spread from the political arena to markets and the microeconomy, and from there to the macroeconomy through escalating exchange rates and inflation. In the absence of structural reforms and amid persistent external pressures and diplomatic deadlock, the Iranian economy's capacity for short-term recovery appears limited. Sustainable improvement would require addressing the underlying causes of economic imbalances, restoring public trust and lifting external sanctions that continue to impede recovery prospects.

## Iran Facing a Storm of Crises and Military Challenges

Iran has increasingly turned to cryptocurrencies for its arms sales, allowing it to bypass traditional payment mechanisms such as International Bank Account Numbers (IBANs) and other global financial transfer systems, which are constrained by international banking restrictions. In a related development, the EU unexpectedly designated the Islamic Revolutionary Guard Corps (IRGC) as a foreign terrorist organization, prompting a reciprocal response from Iran. This file focuses on two key issues: Iran's use

of cryptocurrencies in arms transactions and the EU's designation of the IRGC as a terrorist entity.

### **Sale of Light Weapons via Cryptocurrencies**

Both US President Donald Trump and Iran's Supreme Leader Ali Khamenei share a vested interest in the growing role of cryptocurrencies. With no prospect of a UN Security Council decision lifting sanctions, Iran has increasingly relied on cryptocurrency-based arms sales. The Iranian Defense Ministry's export center markets domestically produced military equipment — including ballistic missiles, drones and warships — to foreign governments in exchange for cryptocurrencies, alongside barter agreements with some nations. This approach reflects Tehran's effort to circumvent conventional banking channels and international financial restrictions.

In January 2026, the Financial Times noted that Iran's offer, first announced the previous year, represented one of the earliest publicly known cases of a state explicitly accepting cryptocurrencies for the export of strategic military assets.<sup>(4)</sup> Iran has developed highly effective small arms, missiles and short-range rockets tailored specifically for non-state armed groups. Variants of these weapons have been employed for nearly two decades by Iran-backed factions across the Middle East. The MindX website cautions prospective buyers that the acquisition of such arms is subject to conditions governing their use “in war with another state,” conditions that are described as open to negotiation between the contracting parties. According to the Stockholm International Peace Research Institute (SIPRI), Iran ranked 18th worldwide in major arms exports in 2024.<sup>(5)</sup> Reports

published in November 2025 revealed that companies based in London and linked to Iran had obtained British technology for use in Iran's nuclear program. Both the MindX website and the Defence Innovation and Research Organisation (DIRRO) were identified as being involved in the procurement of dual-use radiation detection tubes produced by Centronic, a company that supplies the UK Ministry of Defence.<sup>(6)</sup> The persistence of this supply chain, facilitated through the re-export of sensitive technology, underscores the durability of Iran's covert procurement networks.

### **Europe Takes Aim at the IRGC**

On January 29, 2026, the EU announced a new round of sanctions targeting the IRGC, formally designating it as a terrorist organization in response to its excessive use of force against protesters and Iran's support for Russia's war in Ukraine.<sup>(7)</sup> The measures also included restrictive sanctions against a number of IRGC commanders as well as senior police and law enforcement officials. In addition, the sanctions list expanded to cover the Khojir missile development and production complex and Sahra Tondar, an Iranian import-export firm identified as a front company for the Ministry of Defense and Iran's military logistics apparatus.<sup>(8)</sup>

The Iranian Armed Forces General Staff condemned the EU's decision as an “illogical, irresponsible, and hostile” act, asserting that it was carried out in unquestioning alignment with what it described as the hegemonic and inhumane policies of the United States and the Zionist regime. The statement argued that the move reflected the depth of hostility harbored by EU leaders toward the Iranian people, the country's armed forces and

the security and independence of the Iranian republic.<sup>(9)</sup>

In a parallel response, Tehran signaled that it may pursue reciprocal measures, including the possible designation of EU member states' militaries. Parliament Speaker Mohammad Bagher Ghalibaf labeled the armed forces of all EU countries as terrorist entities, arguing that by targeting the IRGC — cast by him as a key barrier to the spread of terrorism into Europe — European governments were acting against their own interests in deference to the United States.<sup>(10)</sup>

German Foreign Minister Johannes Wadephul dismissed Iran's retaliatory step as unfounded and driven by propaganda.<sup>(11)</sup> He argued that a government which violently suppresses peaceful demonstrations, carries out executions against its opponents and exports terrorism to Europe cannot neutralize international criticism through rhetorical campaigns or political messaging.<sup>(12)</sup> At the same time, the United States deported three former members of the IRGC. US Immigration and Customs Enforcement stated that "foreign terrorists are not welcome in our country," announcing that Ehsan Khaledi, Mohammad Mehriani and Morteza Naseri Kakolaki had been returned to Iran over the weekend.<sup>(13)</sup> Against the backdrop of renewed tensions following the deployment of a US naval fleet, Iran announced that it had inducted 1,000 strategic drones into service across all branches of its armed forces. According to Iranian statements, the drones are capable of carrying out a range of missions, including strike operations, reconnaissance, attack roles and electronic warfare, with the ability to engage both stationary and mobile targets across

maritime, aerial and terrestrial domains.<sup>(14)</sup> To date, no images or official designations of the drones have been released, and no technical details have been disclosed concerning their operational range, payload capacity or flight endurance.

## Conclusion

Iran's shift toward using cryptocurrencies to bypass sanctions comes as little surprise, but it raises unresolved questions about the nature of its customers, whether states or non-state actors. Although digital currencies are in fact more traceable than the barter mechanisms Iran has traditionally employed, Tehran appears less concerned with who pays than with sustaining its ability to circumvent international restrictions. In this context, Iran is expected to respond to the EU's designation of the IRGC as a terrorist organization by adopting reciprocal measures against European militaries. Such steps, however, are unlikely to ease the mounting pressure on the Iranian establishment. Ultimately, the only viable path to relief from escalating sanctions lies in reaching an understanding with the United States through the indirect nuclear negotiations being hosted by Oman.

## The Middle Class and Stability in Iran

The bazaar served as the initial catalyst for the protests that swept across Iran in late 2025 and early 2026. Over time, these demonstrations expanded to involve broader segments of society, notably the middle class, which has been in gradual decline for decades. This erosion intensified with the economic pressures on the bazaar community, traditionally seen as part of the middle class, and even affected the affluent tier represented by prominent merchants. Given the bazaar's his-

torical role as a cornerstone of political stability, its weakening heightens the risk of systemic instability. This file examines the issue through two lenses: first, the current realities of the middle class and its connection to the bazaar protests; and second, the nature of middle class demands and the Iranian establishment's containment strategy.

### **Bazaar Protests and the Erosion of the Middle Class**

In recent years, Iranian society has undergone profound structural changes, bringing the middle class perilously close to the poverty line. Families who, at the start of the 2010s, anticipated prosperity in education, travel, entertainment and healthy living — benefiting from relative stability and hopes of diplomatic détente — found themselves struggling for survival<sup>(15)</sup> after the 2018 currency crisis and subsequent economic shocks. Official data indicate that the middle class has contracted by roughly 11% annually. While not entirely vanished, this class has lost its traditional advantages, as incomes no longer keep pace with inflation, yet it remains above the poverty threshold and thus does not receive the level of government support afforded to the poor.<sup>(16)</sup>

A significant portion of the middle class has emigrated, contributing to a growing brain drain. Many who remain are connected to the political system through employment in various sectors or as small traders, historically favoring stability. In 2024, a large segment supported Masoud Pezeshkian, seeking solutions to their economic challenges. However, the return of Trump, the June 2025 military confrontations with Israel and tightened sanctions exacerbated their suffering and closed off hopes for change. These pressures contributed to

the geographical and social expansion of the bazaar protests across 21 provinces, involving teachers, workers, students, doctors, women and members of diverse ethnic groups. This broad participation poses a direct challenge to national stability, as the middle class constitutes the majority of opponents, with roughly 65%<sup>(17)</sup> of those arrested belonging to this group — driven to protest by their inability to secure basic living standards.

### **Middle Class Demands and the Establishment's Containment Tactics**

The middle class in Iran maintains numerous demands it believes are justified, particularly given its educational attainment. These aspirations are difficult for the establishment to satisfy amid a decades-long crisis. At best, current policies can slow the erosion of living standards and provide basic services — measures that primarily benefit the poor. For the middle class, these are merely the minimum, forcing them to protest for rights they consider fundamental. They aspire to living standards comparable to neighboring countries, a desire amplified by the communications revolution, which exposes them to other societies' lifestyles.

Consequently, many have chosen emigration after losing hope of achieving their ambitions within Iran. Aware of the seriousness of these demands, the establishment has alternated between repression and violence, and periods of engagement and dialogue with demonstrators during the recent protests. In this context, Pezeshkian emphasized the need to calm tensions and to listen to citizens' concerns. He stated that, following the 12-Day War and the extensive damage wrought, the government's primary goal is to improve the economy, protect

livelihoods and reform the subsidy system to ensure economic justice and curb corruption and discrimination in areas such as education, health, social welfare, transportation and energy, through initiatives like the Living Justice plan, which distributed 1 million tomans of goods to 80millioncitizens.<sup>(18)</sup>

The president also highlighted the responsibilities of government institutions, cultural and religious bodies and mosques in supporting these efforts.<sup>(19)</sup> Yet, the middle class recognizes that such piecemeal measures will not achieve their broader aspirations. Their election of Pezeshkian reflected a desire for a fundamental shift in foreign policy toward normalizing relations with the West, ending sanctions and realizing their economic hopes — an agenda that clashes with the principles and interests of the “conservative” establishment, dominated by the supreme leader and institutions under his control.

## Conclusion

The Iranian establishment is entering a period of economic uncertainty and ambiguity, with the bazaar emerging as a central driver of the recent protests. The erosion of the middle class has become a critical issue, undermining social capital and fueling broader societal dissent. By nature, the middle class seeks change when stability appears unattainable — a dynamic now evident in Iran, where hopes for reform and improvement have largely dissipated.

Although the establishment has attempted to calm tensions and restore public confidence through limited support measures and temporary fixes, these short-term efforts do not address the underlying problems. What is required are

comprehensive, long-term solutions that correct structural economic imbalances, reform internal policies and systems, strengthen political and international relations and provide citizens with a normal, stable life. Only through such measures can Iran restore its most vital and active social class before the crisis deepens further.

## The Hawza and the Iranian Protests

The Iranian protests erupted in late December, initially triggered by demonstrations led by bazaar merchants before rapidly expanding to encompass broad segments of society across diverse political and social orientations. Almost immediately, the unrest was framed by the authorities as being backed by Israel's Mossad and US intelligence, with the aim of undermining the Iranian revolution, and dismantling the republic. Since the 12-Day War last June, Iran has been grappling with a deep economic crisis that has directly affected citizens' daily lives and eroded the legitimacy of the ruling elite in general, and of the supreme leader in particular. Rather than undertaking strategic political, economic, social or religious reassessments, the leadership persisted with its established approach, deepening both the legitimacy crisis and the economic downturn. These overlapping crises helped fuel the protests, which were met with severe violence by security forces. Within the religious establishment, divisions became apparent: a significant current remained silent to avoid confrontation with security forces employing excessive force, while another, more loyalist faction openly aligned itself with and defended government policies. This divergence raises fundamental questions about the stance of clerical in-

stitutions toward the protests, which this file examines in detail.

### **Khamenei's Messages in Qom**

Khamenei met with a group of residents from Qom without the presence of hawza scholars or senior clerics from the city,<sup>(20)</sup> despite the fact that such meetings customarily include clerical figures. The meeting was held swiftly and in their absence, marking a clear departure from established practice. This absence points to several possible explanations: senior clerics may not have been formally invited, reflecting Khamenei's desire to assert power and legitimacy without the participation of clerical figures, some of whom opposed the security crackdown; alternatively, they may have chosen to distance themselves from broader political developments; or the meeting may have been kept limited due to security considerations amid concerns over potential targeting.

More broadly, this episode highlights the lack of consensus within the hawza regarding the establishment's handling of the protests. Qom does not constitute a unified bloc aligned with the state. Rather, it includes quietist jurists who reject the doctrine of the Guardianship of the Jurist, oppose its domination of the public sphere and resist the subordination of the hawza to political authority. In this context, Khamenei's visit appears intended to reinforce his legitimacy and visibility in Qom — alongside Najaf, the most influential center of Shiite authority — in an effort to reassert his religious leadership and hawza credentials, which have been questioned for more than a quarter of a century since Khomeini's death. The visit also sought to dispel rumors that he was in hiding or fearful of US threats, and may reflect his dissatisfaction with the

silence of a broad current within the hawza, whose anger over the violence against protesters prevented an explicit declaration of loyalty.

At the same time, the Iranian establishment moved to consolidate external clerical support for Khamenei. Clerics from Afghanistan publicly declared their allegiance, portraying him as the “Guardian of the Muslims” and a symbol of steadfastness, while clerics from India, Iraq, Nigeria and other countries issued similar statements of support for the supreme leader and “Islamic” Iran,<sup>(21)</sup> according to hawza-affiliated media outlets.<sup>(22)</sup>

Through these actions, Khamenei appears to be conveying parallel domestic and international messages. Domestically, the signal is directed at quietist jurists, underscoring that his authority transcends national borders and is backed by a transnational bloc of Shiite clerics. Internationally — particularly toward the West — the message is that any attack on the person of the supreme leader or on Iran could trigger wider regional instability, given his capacity to influence Shiite communities and loyalist currents beyond Iran. From this perspective, the implication is that engagement with him remains possible without undermining the existing political-religious power structure.

### **Hawza Divisions**

The Iranian establishment moved to mobilize loyalist clerics in Qom, urging them to publicly declare allegiance to the supreme leader and the political order. For instance, Grand Ayatollah Nouri Hamedani denounced the protests as a betrayal of both the revolution and the state. He described the demonstrations as an act of “incitement to sedition” and argued



that they formed part of a US-Israeli plot aimed at fragmenting “Islamic” Iran and plundering its resources.<sup>(23)</sup>

This framing was echoed by other establishment-aligned figures, including Makarem Shirazi and Hassan Khomeini. Shirazi warned that chaos offers no solutions and claimed that hostile elements were exploiting the unrest to vandalize public property and holy sites, invoking the experiences of Libya and Syria to caution against protests that could endanger a “unified Iran.” Hassan Khomeini similarly asserted that the enemy’s objective was to divide the country and overthrow the Iranian republic, a goal he insisted would never be achieved.

Supreme Leader Khamenei adopted the same narrative advanced by the establishment’s senior pillars. He characterized the events as a “sedition,” accusing the United States and Israel of instigating and managing the unrest. According to Khamenei, Western powers are unsettled by Iran’s renewed strength and therefore seek to “swallow it up.” He described Trump as a “criminal,” while asserting that Muslims today are capable of leading the world, in contrast to Western societies, which he depicted as remaining trapped in profound moral decay, oppression, injustice, bullying and arrogance.<sup>(24)</sup>

Statements issued by the ruling elite and state media outlets depicted the demonstrations — described by the authorities as a “sedition” — as being orchestrated by agents of Mossad. Even if this narrative was accepted at face value, it would expose serious deficiencies within the very security apparatus that had claimed, following the 12-Day War, to have dismantled Mossad networks and arrested their operatives. When protests spread across large swathes of the

country and the establishment responds by branding demonstrators as foreign agents, this reflects a systemic failure on the part of the state and would, under conditions of transparency, warrant accountability.

Yet no investigation has been opened into the performance of the security services, let alone into the responsibility of their leadership. On the ground, the protests drew participation from all segments of Iranian society, including minority communities. The Sunni imam of Zahedan, Abdul Hamid Ismail Zehi, publicly defended the demonstrators and their right to protest, condemning the killing of protesters. He described the deaths of thousands of demonstrators in Tehran and other cities within a matter of days as a horrific and unprecedented catastrophe that plunged Iranian society into grief and anger and deeply shook the conscience of free people worldwide.<sup>(25)</sup>

Nevertheless, the establishment appears intent on bypassing the structural causes that triggered the protests. It shows no inclination toward fundamental solutions, as such remedies would directly affect the principal beneficiaries within the ruling elite and the military and religious establishment. At the same time, the leadership seems incapable of conducting serious policy or theoretical reassessments, owing to the entrenched mindset of the ruling religious elite, as well as factors related to its age and intellectual stagnation.

## Conclusion

Against the backdrop of Trump’s threats to launch military action against Tehran unless it enters serious negotiations and complies with his conditions regarding the Iranian nuclear program, and amid

widespread popular protests which were met with a harsh security crackdown, Supreme Leader Khamenei moved to shore up his legitimacy by mobilizing loyalist Shiite clerics outside Iran, particularly in India, Afghanistan, Iraq and Nigeria. In their statements, he was portrayed as the leader and guardian of Islam and the Muslims.

At the same time, Khamenei traveled to Qom, where he met with a group of local residents in the absence of the city's senior clerics and hawza figures. This move reflected an attempt to reinforce his religious legitimacy domestically and externally, drawing on the broader Shiite sphere and presenting it as a source of support and endorsement. In doing so, he effectively disregarded the internal protests led by Iranian society itself, continuing to frame them as a "sedition" orchestrated by the United States and Mossad.

While segments of the hawza remained silent regarding the unfolding events — whether due to pressure or fear of openly condemning the security forces' violence against protesters — this silence raises serious questions about the claimed independence of the hawza, which in practice appears undermined by direct state interference. Meanwhile, fundamental ethical questions went unaddressed by the ruling religious elite: the impoverishment of citizens that fuels protest and dissent, the killing of demonstrators, violence against their families and the arrest of hundreds without transparent or fair judicial procedures. Consequently, the crisis the leadership may believe it has extinguished remains embedded within Iranian society and is liable to resurface if it continues to rely solely on security solutions rather than addressing its underlying causes.

## **Regional Interactions**

Iran's relations with certain Arab and regional states saw notable developments in January 2026. In Iraq, the United States intensified its engagement following its rejection of Nouri al-Maliki's nomination as prime minister. This included a visit by the US special envoy to Baghdad to address forming the new government, along with issues such as arms proliferation, internal power dynamics and the recalibration of US-Iraq relations.

In Israel, official statements regarding the recent Iranian protests suggest significant involvement in Iran, aiming to influence demonstrations against the government. This involvement has also been used by Iranian security authorities to justify the systematic repression that ultimately quelled the protests.

As for the risk of renewed war against Iran, the United States poses the foremost military threats, though Israel could become a factor if conflict escalates.

### **Key Outcomes of Savaya's Mission and the Formation of Iraq's New Government**

The Iraqi political landscape entered a new phase of uncertainty and anticipation in January 2026 amid intensified US political engagement with Iraq, which has been identified as the next arena for reducing Iranian influence following Lebanon, Yemen and Syria. This coincided with the activation of the mandate of US Special Envoy Mark Savaya,<sup>(26)</sup> a figure associated with the Republican Party and a supporter of President Donald Trump's policies.

Savaya's assignment was to implement a set of presidential directives related to the formation of the new Iraqi government, the spread of weapons, internal power balances, the redefinition of US-Iraq relations and Iraq's network of international alliances. Accordingly, this file focuses on two central issues: first, the factors shaping the trajectory of Savaya's mission; and second, the dilemma surrounding Maliki's nomination for the premiership in light of the US veto on his return to office.

### **Factors Governing the Future of Savaya's Mission**

Savaya's agenda centers on four highly sensitive files that have generated deep concern among pro-Iran Shiite alliances and militias. The first involves dismantling the militia-based order by disarming uncontrolled armed groups and dissolving the Popular Mobilization Forces (PMF). The second focuses on influencing the selection of the next prime minister and the allocation of ministerial portfolios in a manner aligned with US interests. The third priority seeks to sever Iranian financial channels by tightening oversight of suspicious transactions, enhancing transparency in financial transfers and preventing the exploitation of loopholes in Iraq's banking and financial systems that facilitate smuggling, funding networks and the laundering of hard currency for Iran's benefit. The fourth concerns redirecting Iraq's economic and oil partnerships toward the United States, particularly by pressuring Baghdad to replace Chinese oil companies with US firms.

Despite receiving direct backing from Trump and senior members of his administration, Savaya's mission faces substantial obstacles that diminish its prospects for success. These challenges stem from the complexity and interconnection of the files under his mandate, his limited political and diplomatic experience for such a sensitive role and his reliance on coercive approaches toward influential Shiite actors in Iraq. This places him at a disadvantage compared with seasoned figures such as Tom Barrack and Steven Witkoff. Moreover, his efforts are further complicated by the extensive presence of militias across Iraq and by the absence of a clear, operational mechanism within

his portfolio for disarming non-state actors and confining weapons exclusively to state authority — factors that may hinder any attempt to alter the Coordination Framework's inclination to nominate Maliki.

The mandate of Savaya is regarded as among the most difficult in terms of practical execution, particularly with regard to government formation and the spread of uncontrolled weapons. This complexity stems from the fact that many militias have institutionalized their presence within the PMF through brigades and factions that operate under the authority of their own commanders rather than the PMF leadership or the commander-in-chief of the armed forces, namely the prime minister. As a result, these groups are less responsive to formal state pressure. Moreover, militia influence extends across political, economic and military domains, with a strong presence in the Parliament, judiciary and security services, providing them with substantial leverage against any measures that threaten their interests — particularly after accumulating significant financial resources through black market activities that are not necessarily dependent on Iranian support.

These dynamics further complicate efforts related to government formation and the control of unregulated arms. In response, the United States may turn to coercive tools should Iraq fail to comply with US demands. These could include financial sanctions targeting banks, financial institutions and companies implicated in corruption, the freezing of assets belonging to Shiite figures aligned with Iran and increased pressure within the oil sector. Washington retains leverage through its influence over Iraq's oil revenues, including the ability to tighten oversight of oil export channels and dollar transfers via the US Federal Reserve. In addition, the United States could consider limited military strikes against specific Iraqi targets or adopt a decapitation strategy involving targeted assassinations of figures seen as obstructing US objectives — particularly in light of decla-

rations by certain militia leaders expressing readiness to side with Iran in the event of a direct conflict.

### **The Potential Designation of Maliki as the New Premier**

Just two days after the Iran-backed coalition nominated Maliki for a third term as prime minister, Trump vetoed the appointment, warning of potential repercussions for US-Iraq relations and asserting that the United States would withhold assistance if Maliki returned to power.

Several factors underpin Trump's rejection. Chief among them is the perception that Maliki's reinstatement would cement Iranian dominance and heavily influence the nomination and formation of Iraq's government. Trump also views Maliki as an obstacle to US objectives in Iraq, including disarming militias, dissolving the PMF and strengthening economic and oil ties with the United States. Instead, Maliki's return would likely facilitate Iranian consolidation, notably through initiatives such as the proposed PMF law amendment, thereby entrenching Iranian power. Additionally, the Trump administration considers Maliki's previous tenure (2006-2014) to have left a legacy of political dysfunction, sectarian conflict and security failures that contributed to the rise of ISIS, which seized control over nearly a third of Iraqi territory. Consequently, Washington is pushing for a "more independent" leader, linking continued military and financial support to abandoning the Maliki option and warning that Iraq would have "zero chance of success" without US backing.

Conversely, the Coordination Framework insists on the Maliki candidacy, framing it as a sovereign Iraqi decision based on electoral outcomes and national consensus. Iranian considerations likely reinforce this position, viewing Maliki as a reliable actor to protect its geopolitical gains and potentially as a bargaining chip amid rising US-Iran tensions. Maliki enjoys strong Iranian support, regarded as a seasoned politician with guaranteed loyalty, commanding influence within state

institutions and backed by forces and militias seeking to preserve their own leverage. He retains a conservative Shiite base benefiting from his past rule, granting him enduring political weight. His continued presence also shields him and allied figures from scrutiny, as some factions support him less out of loyalty than from fear of destabilizing alternatives. In an environment lacking consensus and dominated by mistrust among competing factions, Maliki represents a known quantity — a controllable lesser evil amid complex political dynamics.

The Coordination Framework's insistence on Maliki faces multiple obstacles that limit its capacity to form a government and may introduce complexities threatening its success. Key challenges include the US veto and the risk of sanctions, regional opposition to his return, and, most critically, intra-Shiite divisions. Maliki encounters strong resistance from figures within the Coordination Framework, such as Ammar al-Hakim, leader of the Wisdom Movement, and Qais al-Khazali, head of Asa'ib Ahl al-Haq, as well as hesitant acceptance from the Reconstruction and Development Alliance, led by Prime Minister Mohammed Shia' al-Sudani. Beyond the Coordination Framework, Maliki also confronts a clear veto from Muqtada al-Sadr and the Najaf religious authority.

## Conclusion

Savaya's mission faces fundamental obstacles due to Iraq's internal power dynamics, the entrenched influence of militias and the country's strategic importance to Iran in terms of geography, politics, economics and security. Consequently, the envoy may either advance his objectives or fail to achieve meaningful progress, particularly on sensitive issues such as government formation and the control of unregulated weapons. His limited political experience may prevent him from presenting convincing and practical proposals to influential Shiite factions. Should this occur, Savaya could become a liability for Washing-

ton, prompting consideration of his replacement with a more capable envoy to handle Iraq's complex political landscape.

## The Israeli Factor in Iranian Confrontations and the Prospects of War

The Trump administration and the Israeli government accompanied the protests that swept Iran in late December 2025 and early January 2026 with repeated statements supporting the demonstrators and warning the ruling establishment against repression. In this context, the unrest was framed as an extension of the June 2025 war, which sought, in part, to encourage Iranians to rise against the ruling order. With persistent US threats of renewed military action — reinforced by the deployment of the US Navy near Iranian waters — Israel was directly and indirectly involved in both the protests and the accompanying war rhetoric. This file examines these interactions by analyzing Israel's role in the unfolding events in Iran, focusing on two central issues: first, Israel's incitement to insurrection, and second, Israel's position amid the mutual threats between Iran and the United States against the backdrop of heightened regional tensions and the looming risk of renewed conflict.

### Israeli Calls for Insurrection

Israel engaged in the Iranian protests from the very outset. Just one day after demonstrations began, on December 29, the Mosad's Persian-language X account addressed Iranian citizens directly: "Take to the streets together, the time has come. We are with you, not just from afar and with words — we are with you on the ground too."<sup>(27)</sup> At the official government level, however, rhetoric was more restrained. On December 31, Israel's Channel 12, citing a senior official, reported that Prime Minister Benjamin Netanyahu had decided against taking a public stance on the protests, concerned that doing so could provide Tehran with a pretext to target Israel and deflect attention from its internal economic challenges.<sup>(28)</sup> Another possible motive



for the government's cautious approach was to avoid accusations that the protests were part of a foreign-backed plot against Iran. Consequently, Israeli statements shifted toward general expressions of support, without suggesting direct intervention. On January 4, Netanyahu publicly voiced support for the ongoing protests, describing them as potentially pivotal in Iran's history.<sup>(29)</sup> On January 9, Netanyahu further instructed his cabinet ministers to avoid making public statements, aiming to prevent the Iranian government from gaining additional pretexts to attribute blame to Israel.<sup>(30)</sup> In his ongoing public statements supporting the protests, Netanyahu stressed that containing Iran remains a top security priority for Israel. He affirmed that the country will continue to take decisive measures against Tehran's efforts to consolidate its military presence in the region and advance its nuclear capabilities. Netanyahu also highlighted that Israel is undertaking significant actions, both overt and covert, to prevent Iran from acquiring a nuclear weapon.<sup>(31)</sup>

Israel's public efforts to distance itself from the Iranian protests largely failed. After demonstrations escalated into violence and destruction, the Iranian establishment propagated a conspiracy narrative as the official explanation, overshadowing legitimate protestor demands. This narrative drew strength from Israeli and US statements supporting the demonstrators, the perceived threat of military intervention and practical measures such as providing internet access through Starlink devices. Former Crown Prince Reza Pahlavi also played an inciting role by encouraging protests and street demonstrations, recalling his previous support for an Israeli military strike against Iran in June 2025.

Within this framework, most protest leaders were labeled as saboteurs, agents or terrorists. Security forces conducted widespread arrests, potentially numbering in the hundreds or thousands, with frequent announcements of arrests across Iranian cities. Some participants received death sentences on charges of spying for Israel. Iranian offi-

cials framed the suppression of the protests as a victory over the US-Zionist adversary, echoing the narrative of the 12-Day War. For example, on January 24, Iranian Parliament Speaker Mohammad Bagher Ghalibaf stated: "The Zionist entity carried out simultaneous and organized terrorist acts in various Iranian cities, but thanks to the courage and sacrifices of individuals, as well as divine support, it suffered a defeat in less than 48 hours — an outcome even more humiliating than the 12-Day War."<sup>(32)</sup>

Iranian Deputy Foreign Minister Vahid Jalalzadeh characterized the recent unrest and so-called terrorist acts in Iran as an extension of Israeli and US military aggression. He asserted that these countries sought to use the civil and labor protests as a pretext to facilitate military action against Iran, but the large turnout of regime supporters effectively thwarted their plans.<sup>(33)</sup>

### **The Israeli Factor in the Potential War**

At this stage, the United States has emerged as the primary source of the threat of war against Iran, in contrast to the period before the June 2025 war, when Israel was the main driver of military confrontation — both in rhetoric and in action, as demonstrated during the Gaza conflict. This shift, however, does not imply that Israel is excluded from the potential conflict; it is still expected to play a role, even if a strike is conducted solely by the United States. According to the Israeli Public Broadcasting Corporation on January 5, Netanyahu enlisted Russian President Vladimir Putin to convey "reassuring" messages to Tehran, signaling that Israel had no intention of launching an attack.<sup>(34)</sup> Israel has recently sought to distance itself from the United States concerning any direct involvement in a potential conflict. Amid discussions of a possible strike on Iran, Netanyahu instructed his cabinet ministers on January 12 to refrain from making public statements about foreign intervention, signaling caution in the midst of internal and regional tensions.<sup>(35)</sup> On January 16, The New York Times, citing a senior US official, reported that Netanyahu had

requested Trump to delay any potential plans for a US strike on Iran.<sup>(36)</sup> Tehran has warned that any attack — even one targeting the supreme leader — would prompt a significant response that could escalate into a broader regional conflict, with Israel among the likely targets. Israel is treating these Iranian warnings with seriousness. Major General Rafi Milo, commander of the Israel Defense Forces' Northern Command, said the army is preparing for the possibility that a US strike on Iran could trigger an Iranian retaliatory attack against Israel. He added that Israeli forces are also closely monitoring whether Hezbollah might enter a wider confrontation in the event of escalation.<sup>(37)</sup>

### **Conclusion**

The outcome of the January protests in Iran laid bare Israel's involvement, as it sought to incite demonstrators to bring

down the establishment. While the extent of Israel's on-the-ground role remains unclear, it was clearly reflected in the Iranian government's justification for deploying repressive measures to end the unrest. Israel appears intent on using military force to support the protests and destabilize the establishment. Yet, the effectiveness of Iranian security forces in containing the demonstrations has complicated Israeli calculations regarding the potential repercussions of a military strike. This has created a state of hesitation in Israel between initiating a strike and holding back. The situation is further complicated by Trump's preference for targeted, rapid strikes over a full-scale war — an option that carries uncertainty, as the possibility of a broader conflict and significant missile attacks on Israel remains a tangible threat.

## **Iran and the United States**

Tensions between Iran and Western powers, particularly the United States, peaked in January 2026 after President Donald Trump discussed potential measures, including military action under the pretext of supporting protesters. While the situation escalated toward a potential confrontation, both Washington and Tehran appeared committed to pursuing diplomatic channels, averting war.

## US Military Consolidation to Impose a New Reality in Iran

Tensions between the United States and Iran reached a critical point in January 2026, amid widespread protests and following discussions by Trump of multiple options for addressing Iran, including potential military action in support of the demonstrators. In response, Iran affirmed its readiness to confront US measures and reiterated its refusal to engage in negotiations under coercion. These opposing stances brought the two nations perilously close to military confrontation. Yet, shared assessments regarding the potential effectiveness of diplomacy, the prospects of a settlement that could spare both sides the costs of armed conflict and the influence of regional pressures and mediation efforts encouraged both parties to return to diplomatic engagement and examine ways to resolve their differences while avoiding war. This episode raises pressing questions about the scope of the US threat, Iran's approach to managing it and the implications of this escalation for bilateral relations.

### The US Military Threat

Trump's approach oscillated between threats of military escalation and a willingness to pursue diplomacy, at times appearing inconsistent. Following widespread protests in early 2026, he declared that the United States was prepared to intervene should the Iranian government kill demonstrators and assured protesters that US assistance was forthcoming. The declining legitimacy of the Iranian establishment seemingly encouraged Trump to consider intervention to expedite political change. Reports indicated that he was presented with options including targeted strikes against security forces, the military and senior leadership,

including the supreme leader, as a means to bolster the protesters and accelerate regime change. However, Trump quickly reversed course, asserting that the state had ceased executions, despite unofficial accounts suggesting thousands of deaths.

The popular movement subsequently weakened under severe repression, and Trump did not deliver the support he had promised. Nevertheless, he resumed threats of force, while the USS Abraham Lincoln and several other warships moved into the region, lending credibility to the US threat and broadening the president's options. Ultimately, this development increased pressure on the Iranian establishment to negotiate on Trump's terms, particularly regarding reduced uranium enrichment and limitations on its missile program. These events underscore the central disputes between Washington and Tehran and highlight the current US administration's prioritization of strategic interests over declared values.<sup>(38)</sup>

### Iran Prepares for Confrontation

The Iranian establishment capitalized on Trump's stance regarding internal developments to frame the protests as an US-Zionist conspiracy, providing a justification for maximum repression and the forcible assertion of control. While the demonstrations revealed a notable decline in the establishment's legitimacy, they also demonstrated its capacity to maintain domestic order and frustrate US attempts to exploit internal dissent to intensify pressure by inciting popular anger. Nevertheless, the establishment treated Trump's threats with caution, taking them seriously. Its rhetoric, from both religious and political wings, emphasized three key points: rejecting US threats, preparing for potential military

confrontation — including adjustments to its combat doctrine — and signaling a willingness to resume diplomacy. This messaging conveyed a refusal to submit to American pressure, raising the potential cost of confrontation for Washington and regional actors, while simultaneously indicating a readiness for negotiations conducted with respect, without preconditions or predetermined outcomes.

Iran's position was reinforced by a regional context wary of military escalation, which could trigger internal unrest, threaten regional stability, cause refugee flows, exacerbate violence and disrupt oil shipments through the Strait of Hormuz, with potential consequences for global energy markets. Consequently, Saudi Arabia, Qatar, Oman and Egypt pressured Washington to avoid military action. Iran also secured assurances from Gulf neighbors that they would not participate in an attack nor allow their territories to be used, and received backing from allies such as Hezbollah, which threatened to intervene should Khamenei be targeted.<sup>(39)</sup>

### **A Deal or War?**

Regional mediation efforts succeeded in bringing the United States and Iran back to the negotiating table; however, the diplomatic process remains highly complex due to the absence of agreement on a defined agenda. Trump's objectives in these negotiations appear inconsistent, oscillating between pursuing a comprehensive agreement that addresses core contentious issues — including Iran's nuclear program, ballistic missile capabilities and regional alliances — and seeking a narrower accord focused primarily on the nuclear dimension. Iran, meanwhile, is negotiating under the most intense pressure campaign it has faced since the

revolution, confronting tangible threats of military action should talks fail. Despite this, Tehran maintains firm red lines, particularly regarding its ballistic missile program, which it refuses to place on the negotiating table.

There may be potential for a mutually beneficial agreement, driven by several factors: the Iranian establishment, which faces a threat to its legitimacy under sanctions and is wary of Trump's unpredictable actions; the US administration, which is focused on Western priorities and reluctant to become further entangled in foreign conflicts; and regional powers, which seek stability and wish to avoid widespread chaos. Nevertheless, historical precedent suggests a more pessimistic outcome. Previous negotiations began under similarly positive conditions, but Washington, influenced by Israeli pressure, escalated its demands — going so far as to require that Iran halt uranium enrichment on its territory and address other contentious issues, including its missile program and regional alliances. Iran rejected these demands, prompting the US shift toward military action, initially led by Israel and subsequently executed by the United States, culminating in the conflict known as the 12-Day War.

### **Conclusion**

As Washington positions its strike forces in the region, expanding Trump's range of options, and the Iranian establishment experiences a marked decline in domestic legitimacy, the US president may insist during negotiations on the full implementation of his demands, particularly restrictions on Iran's missile capabilities, which he regards as the most immediate and dangerous threat after targeting

nuclear facilities. In this scenario, the Iranian establishment might make concessions to preserve its survival, representing a notable breakthrough and a chance for Iran to recalibrate its position and relations with the West. Conversely, Tehran could resist certain US conditions, view-

ing them as infringements on its sovereignty and a diminution of its deterrent capacity. Should this occur, the United States may resort to a forceful approach, putting the survival of the Iranian establishment under severe strain.



## Endnotes

- (1) "World Economic Outlook," *IMF*, October 2025, accessed February 8, 2026, <https://bit.ly/46hWARa>.
- (2) بی بی سی/فارسی، «آنچه گذشت؛ ادامه قطعی اینترنت و لغو پروازهای لوفت هانزا به ایران تا ۹ فروردین»، تاریخ اطلاع: 8 فرایر 2026. <https://bit.ly/3YNsTn6>.
- (3) آرزو کریمی، «اعتراف خامنه‌ای به بحران معیشت و لغو استیضاح وزرا چه معنایی دارد؟»، (29 دی 1404 ه.ش)، تاریخ اطلاع: 8 فرایر 2026. <https://bit.ly/4jLleHD>.
- (4) Miles Johnson, "Iran Offers to Sell Advanced Weapons Systems for Crypto," *The Financial Times*, January 1, 2026, accessed February 3, 2026, <https://bit.ly/4bEJMrC>.
- (5) Zain Hussain and Dr Alaa Tartir, "Recent Trends in International Arms Transfers in the Middle East and North Africa," *SIPRI*, April 10, 2025, accessed February 3, 2026, <https://bit.ly/4qooxOk>.
- (6) Miles Johnson, "Iranian Nuclear Scientists Sell Products With Croydon-made Parts," *The Financial Times*, November 25, 2025, accessed February 3, 2026, <https://bit.ly/4ryYkxv>.
- (7) "Iran: Council Adopts New Sanctions Over Serious Human Rights Violations and Iran's Continued Support to Russia's War of Aggression Against Ukraine," *Council of the EU*, January 29, 2026, accessed February 3, 2026, <https://bit.ly/4cnX4ca>.
- (8) Ibid.
- (9) "Iran's Top Military Body Blasts EU's Move Against IRGC," *Mehr News Agency*, January 29, 2026, accessed February 3, 2026, <https://bit.ly/4ajnQjp>.
- (10) "Iran Says It Now Considers All EU Militaries Terrorist Groups," *DW*, January 2, 2026, accessed February 3, 2026, <https://bit.ly/4bD68tA>.
- (11) "Germany FM Labels Iran's Designation of EU Armies as Terrorists 'Propagandistic,'" *DW*, January 2, 2026, accessed February 3, 2026, <https://bit.ly/46tG-PXn>.
- (12) Ibid.
- (13) "US Deports Three Former IRGC Members, ICE Says," *Iran International*, January 28, 2026, accessed February 3, 2026, <https://bit.ly/3O2unHS>.
- (14) "Iran's Army Integrates 1,000 Strategic Drones Into Four Units," *Mehr News Agency*, January 29, 2026, accessed February 3, 2026, <https://bit.ly/46BGHVK>.
- (15) میدل ایست نیوز، الصحافة الإیرانیة: کیف انهارت معیشتة الطبقة المتوسطة فی ایران خلال عقد؟ (06 دسیمبر 2025م)، تاریخ اطلاع 25 ینایر 2026م، [4aknGZb.ly.bit/](https://4aknGZb.ly.bit/).
- (16) موقع فرارو، آیا پنجره نجات طبقه متوسط ایران بسته شده است؟ (23 ینایر 2026م)، تاریخ اطلاع 25 ینایر 2026م، [4c6PZwC.ly.bit/](https://4c6PZwC.ly.bit/).
- (17) وكالة خیرگزاری تسنیم، خوانش اقتصادی سیاسی از ترکیب اجتماعی معترضان (27 ینایر 2026م)، تاریخ اطلاع 28 ینایر 2026م، [4k9Oq3d.ly.bit/](https://4k9Oq3d.ly.bit/).
- (18) موقع شبکه شرق، هشدار روزنامه اطلاع طلب به مسئولان: وعده‌ها دیگر کارساز نیست (20 ینایر 2026م)، تاریخ اطلاع 22 ینایر 2026م، [4ki9ULc.ly.bit/](https://4ki9ULc.ly.bit/).
- (19) موقع موقع پایگاه اطلاع رسانی جمهوری اسلامی ایران، نهاد مسجد با کارکردهای وسیع خود در سطح جامعه می‌تواند در حل مشکلات مردم و جوان تربیت نسل نوجوان و جوان بسیار کارگشا باشد/ مهم‌ترین اولویت و دغدغه دولت در شرایط فعلی بهبود شرایط اقتصادی و صیانت از معیشت مردم است (19 ینایر 2026م)، تاریخ اطلاع 22 ینایر 2026م، [4qeE6lv.ly](https://4qeE6lv.ly).
- (20) ایران وایر، اختصاصی: جلسه دیدار خامنه‌ای با مردم قم بدون اطلاع مراجع برگزار شد، 09 ینایر 2026م (تاریخ اطلاع: 27 ینایر 2026م). <https://bit.ly/4qbHHaX>.
- (21) "Afghan Clerics Declare Loyalty to Leader of Iran's Islamic Revolution," *Hawzahnews Agency*, January 31, 2026, accessed January 31, 2026, <https://bit.ly/4qL9bVc>.
- (22) "Indian Friday Imam: Iran's Revolution Leader Symbolizes Hope for the

Oppressed,” *Hawzahnews Agency*, January 31, 2026, accessed January 31, 2026, <https://bit.ly/4kkaLuY>. Also see “Iraqi Ahdullah Movement Chief Slams Trump Remarks on Iran, Warns of Severe Regional Fallout,” *Hawzahnews*, accessed January 31, 2026, <https://bit.ly/3M8mIXL>.

(23) موقع ایران اینترناشونال-النسخة الفارسية، نوری همدانی، مرجع تقلید: هرگونه فتنه‌گری، خیانت به نظام و انقلاب است،

15 بنابر 2026م (تاریخ اطلاع: 27 بنابر 2025م). [4jDY9yk/ly.bit/](https://4jDY9yk/ly.bit/)

(24) قناة العالم النسخة الفارسية، رهبر معظم انقلاب: فتنه اخیر یک فتنه آمریکایی بود و هدف آمریکا بلعیدن ایران است / رئیس جمهور آمریکا، مجرم اصلی فتنه اخیر است، 17 بنابر 2026م (تاریخ اطلاع: 28 بنابر 2026م).

[4r2qtgs/ly.bit/](https://4r2qtgs/ly.bit/)

(25) حسابیه علی منصه اکس، 13 بنابر 2026م. (تاریخ اطلاع: 27 بنابر 2026م). [3ZXpMJD/ly.bit/](https://3ZXpMJD/ly.bit/)

(26) \* A prominent and influential American businessman in Michigan of Iraqi Christian Chaldean origin from the Nineveh Plain, born in Iraq in 1983. He settled with his family in Michigan in the 1990s. His business background is linked to founding a US company specializing in the cultivation and sale of cannabis (marijuana). He is known for his affiliation with the Republican Party and support for President Trump, who appointed him in October 2025 as special envoy to Iraq.

(27) موقع I24 نیوز، «الموساد» في رسالة غير معتادة للإيرانيين: «نحن معكم أيضاً على الأرض»، 2025/12/29، شوهده في: (2026/01/29)، على الرابط: [9TQ8/me.shortener-url/](https://9TQ8/me.shortener-url/)

(28) موقع ایران اینترناشونال، قناة اسرانیلیه: نتنهاو قرر عدم اتخاذ موقف علني بشأن الاحتجاجات في إيران، 2025/12/31، شوهده في: (2026/01/29)، على الرابط: [4a6F8Sa/ly.bit/](https://4a6F8Sa/ly.bit/)

(29) سي أن أن عربية، نتنهاو يعلق على احتجاجات إيران وموقف ترامب من نزاع سلاح حماس، 2026/01/04، شوهده في: (2026/01/29)، على الرابط: [9UUL/me.shortener-url/](https://9UUL/me.shortener-url/)

(30) سي أن أن عربية، مصدر يوضح لـCNN سبب عدم تعليق المسؤولين الإسرائييين علنا على احتجاجات إيران، 2026/01/09، شوهده في: (2026/01/29)، على الرابط: [9UTY/me.shortener-url/](https://9UTY/me.shortener-url/)

(31) موقع I24 نیوز، نتنهاو: «نحن نتابع عن كثب ما يحدث في إيران، وندعم النضال من أجل الحرية»، 2026/01/11، شوهده في: (2026/01/29)، على الرابط: [9UGX/me.shortener-url/](https://9UGX/me.shortener-url/)

(32) وكالة تسنيم، رواية قاليباف عن هزيمة العدو في 48 ساعة، 2026/01/.....، شوهده في: (2026/01/25)، على الرابط: [3Z1ylmi/ly.bit/](https://3Z1ylmi/ly.bit/)

(33) موقع سبوتنك، مساعد وزير الخارجية الإيراني: ملايين المؤيدين للنظام أحبطوا مؤامرة أمريكا وإسرائيل، 2026/01/.....، شوهده في: (2026/01/25)، على الرابط: [3Lve6ug/ly.bit/](https://3Lve6ug/ly.bit/)

(34) موقع عرب 48، تقرير: نتنهاو ينقل «رسائل تهدئة» لإيران عبر بوتين، 2026/01/05، شوهده في: (2026/01/28)، على الرابط: [9VXC/me.shortener-url/](https://9VXC/me.shortener-url/)

(35) العربية نت، نتنهاو يطلب من وزارته عدم الحديث عن «ضربة إيران»، 2026/01/12، شوهده في: (2026/01/29)، على الرابط: <https://url-shortener.me/9UJM>

(36) تايمز أوف إسرائيل، نتنهاو طلب من ترامب التريث في توجيه ضربة لإيران، 2026/01/16، شوهده في: (2026/01/28)، على الرابط: [9PIJ/me.shortener-url/](https://9PIJ/me.shortener-url/)

(37) تايمز أوف إسرائيل، قائد المنطقة الشمالية: الجيش الإسرائيلي مستعد على كافة الجبهات إذا أدى هجوم أمريكي على إيران إلى رد انتقامي، 2026/01/26، شوهده في: (2026/01/28)، على الرابط: [9OUU/me.shortener-url/](https://9OUU/me.shortener-url/)

(38) يورونيوز، توافق يا جنگ؟ مقامات خليج فارس: حمله أمريكا محتمل است؛ ترامب احتمالاً رهبري ایران را هدف می‌گیرد، (۲۰۲۶/۰۱/۲۷)، تاريخ الاطلاع: 5 فبراير 2025، <https://tinyurl.com/2acrijbos>

(39) محمد هادی مرادی، پالس مذاکره زیر سایه تقابل نظامی، موقع اکویران، (۲۹ دی ۱۴۰۴)، تاريخ الاطلاع: 5 فبراير 2025، <https://tinyurl.com/29dhep3z>



# **Iran Case File**

**January 2026**

[WWW.RASANAHHIIS.ORG](http://WWW.RASANAHHIIS.ORG)