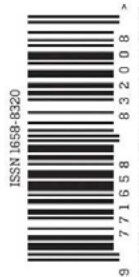


MONTHLY REPORT

Iran Case File

July 2026

Your window on Iran from inside and abroad





MONTHLY REPORT



Iran Case File

July 2026

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EXECUTIVE SUMMARY

The Iran Case File (ICF) for July 2026 highlights significant developments in Iran during the month. On the domestic front, it examines the latest military, social and ideological developments. Externally, it assesses Iran's relations with its Arab and regional neighbors, including the Gulf states, Iraq, Syria, Yemen and Israel, as well as its interactions with international powers, particularly the United States.

The ceasefire reached between Iran and the United States in June collapsed. US airstrikes targeted Iranian military infrastructure, while Iran attacked commercial vessels and neighboring countries, including Bahrain, Jordan and Kuwait, while refraining from targeting Israel. The dual blockade of the Strait of Hormuz reduced maritime traffic by more than 50%, driving up oil prices and disrupting global maritime supply chains.

Socially, Iran's ruling establishment has faced numerous protests over the past two decades, providing a clear indication of its declining strength and eroding social capital. This reality contributed to the development of a war plan by the United States and Israel to dismantle the political system through the incitement of insurrection alongside joint military operations. Although the Iranian establishment survived this test during the February attacks, which killed Supreme Leader Ali Khamenei, the erosion of social capital remains a concern amid the prolonged state of war and its repercussions for social and living conditions. This has made the establishment's policies a source of controversy and social division,

increasing the likelihood of renewed protests.

Ideologically, Friday sermons, particularly in major Iranian cities such as Tehran, Qom and Mashhad, serve as instruments of mobilization and indoctrination. Through these sermons, regional developments are reinterpreted and the boundaries of acceptable positions are defined by linking political and military decisions to a religious framework that confers legitimacy and religious sanctity upon them. During July 2026, a religious discourse emerged that combined the glorification of military power, the defense of Iraq's Popular Mobilization Forces (PMF), praise for Hezbollah and factions in Gaza and Yemen and reaffirmation of continued support for the "Axis of Resistance." These themes reflect a political vision in which the boundaries of the Iranian establishment extend beyond its geographical borders, while resistance has evolved from an instrument of foreign policy into an entrenched state doctrine.

Iran's relations with Arab and regional states witnessed significant developments. Regarding Gulf-Iran relations, July 2026 saw a new wave of Iranian escalation against countries across the region following the collapse of the memorandum of understanding. Iran resumed its attacks against several Gulf states and mobilized its militia proxies in Yemen and Iraq to target Saudi Arabia and other Gulf countries. This reflects Tehran's determination to raise the costs of

US pressure and threats, but at the expense of the Gulf states. This came despite the Gulf states' demonstrated commitment in practice to the principles of good neighborliness during recent periods of conflict, as they refrained from taking military action against Iran and did not allow their territories or airspace to be used to launch attacks against it.

On the Iraqi front, Prime Minister Ali al-Zaidi undertook three visits to the United States, Iran and Türkiye in an effort to establish a balanced approach to Iraq's foreign relations and address outstanding issues with the three countries. His objective was to extricate Iraq from the cycle of debilitating regional conflicts and wars, in line with his ministerial program emphasizing the state's monopoly over weapons. During these visits, he signed approximately 48 strategic agreements and memoranda of understanding with Washington and around five significant agreements and memoranda of understanding with Ankara, compared with two agreements and three memoranda of understanding with Tehran. His visit to Tehran failed to produce a breakthrough on the issues of dismantling militias and exporting Iraqi oil through the Strait of Hormuz. Iran maintained its position of using Iraqi oil as a bargaining chip in international relations, seeking to reduce the volume of oil supplied to global markets in order to prevent prices from falling, thereby easing domestic economic pressure while

simultaneously increasing economic strain on Western capitals, particularly the United States.

The developments of July 2026 brought Syria back into focus as an arena of competition between Iran's efforts to restore its supply lines and expand its response to the United States, and Damascus' efforts to distance its territory from the Iranian sphere of influence. The seizure of an arms shipment suspected of being destined for Hezbollah, together with Tehran's announcement that it had targeted al-Tanf, highlighted Iran's growing need for the Syrian arena while also exposing its diminishing ability to effectively use and activate it amid its ongoing conflict with the United States.

The Yemeni arena likewise witnessed an unprecedented shift in July 2026, marked by Iran's renewed activation of the Houthi card as part of its strategy to expand the scope of the conflict and open a new pressure front in the Red Sea and Bab al-Mandab, alongside the Strait of Hormuz. By mobilizing the Houthis, Iran sought to threaten maritime and energy routes, close alternative maritime routes for trade and oil and increase the costs of its confrontation with the United States, thereby strengthening its negotiating position. The Houthis, in turn, exploited the escalation to pursue domestic objectives, including mobilizing their supporters, containing popular and tribal discontent, securing alternative sources of funding, and repositioning themselves

militarily and politically amid mounting challenges. The timing of Iran's move alongside the Houthi escalation reflects a clear convergence of interests between the two sides, making the Red Sea and Bab al-Mandab a shared pressure point that could persist and escalate depending on the trajectory of the US-Iranian confrontation.

At the level of Iran-Israel interactions, the renewed military confrontation between Iran and the United States following the collapse of the memorandum of understanding and Prime Minister Benjamin Netanyahu's visit to Washington revealed Israel's position within the conflict equation. Both the United States and Iran effectively agreed to exclude Israel: Washington prevented it from becoming directly involved in the war, while Tehran, in turn, excluded it from its list of targets. This means that Israel has become a key factor in determining the level of confrontation, whether through limited strikes or a full-scale war, although the ultimate decision rests with US President Donald Trump.

Internationally, the memorandum of understanding signed between the United States and Iran collapsed because of fundamental disagreements over several of its provisions, most notably those concerning the regulation of navigation through the Strait of Hormuz. Consequently, the temporary ceasefire broke down and military confrontations resumed between the two sides, returning the situation

to a state of open confrontation. This occurred before regional powers exerted pressure and mediators intervened to bring the two sides back to

the diplomatic track, amid continued debate over the complexities of the conflict and its outcomes.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

The renewed military escalation between the United States and Iran in July 2026 cast a shadow over Iran's domestic landscape, reshaping its military, social and ideological dynamics. Against this backdrop, our latest analysis examines three key developments: the growing politicization of Friday sermons and the strengthening of armed groups, the continuation of the US-Iran "game of challenge" and the erosion of the Iranian establishment's social capital.

Politicizing Friday Sermons to Justify Militarization

The Friday sermon in Iran has never been purely religious or exhortative, nor has it ever been detached from the political sphere. It is not merely a personal expression of the preacher's interpretation or position. Rather, the pulpit, particularly in Tehran, Qom and Mashhad, serves as a tool of mobilization and indoctrination through which regional events are reinterpreted, the boundaries of acceptable positions are defined and political and military decisions are linked to a religious framework that confers legitimacy and, at times, sanctity and even infallibility upon them. Thus, the Friday sermon reveals the methods through which the religious and political establishment seeks to shape public perceptions.

During July 2026, a religious discourse emerged that combined the glorification of military power, the defense of the Popular Mobilization Forces (PMF) and an emphasis on continued support for the "Axis of Resistance," while simultaneously seeking religious justification for negotiations and de-escalation. Frequent references to Ashura, Karbala and the Treaty of Hudaibiyyah served not merely historical or emotional purposes but also became tools for interpreting the current political landscape and defining the options available within it. This file monitors and analyzes the political messaging inherent within Iranian Friday sermons, demonstrating how resistance

has been transformed from an instrument of foreign policy into an integral state doctrine, and how religious heritage is employed to legitimize war or pave the way for a settlement in accordance with the requirements of the moment.

Messages From the Pulpit

Tehran's Friday prayer leader Mohammad Hassan Abu Torabi praised the "men, youth, and women of Iraq" who, he said, had been raised in the tradition of Ashura, "Peace be upon the pillars of steadfast resistance and unwavering resolve." He went on to praise Hezbollah and the youth and women of Gaza, while commending the "fighters of Yemen." According to him, the rules governing today's political landscape are based on "the principle of power, not the principle of justice."⁽¹⁾

The Friday sermon in Tehran echoed the discourse heard in Qom. Mohammad Saeedi, Qom's Friday prayer leader, described the attack on the PMF as a "cowardly act," portraying it as an expression of the wrath of the "Western-Hebrew-Wahhabi" axis against the PMF, which he considers a "red line for the Islamic Republic." Saeedi's proposed response was to call on the Iraqi government to increase its support for the PMF. Regarding Tehran, he reaffirmed the continuation of Iran's strategy of supporting the resistance front and the ongoing exchange of messages between the supreme leader and Hezbollah's secretary-general. At the same time,

however, he appeared to leave room for dialogue and even retreat, invoking the Treaty of Hudaibiyyah and suggesting that “victory” extends beyond military achievements. He stated, “In the intellectual framework of Islam, preventing the escalation of conflict, preserving human lives, and creating conditions conducive to guidance are all manifestations of true victory.”⁽²⁾ In a similar vein, Ayatollah Alamolhoda, the supreme leader’s representative in Mashhad, stated, “The political teachings of the Imams contain guidance relevant to our political circumstances. We are Hussaini and Karbalai, and throughout our lives we have spoken about Imam Hussain for the sake of our present,⁽³⁾ so that every action remains within the framework of Imam Hussain’s life, his uprising, and this path.”

It can be argued that the central theme uniting the various strands of Iranian Friday sermons is the construction of a religious and political nexus between resistance and negotiation. All other issues fall within this framework: the PMF are portrayed as part of the geography of resistance, the Strait of Hormuz as an instrument of deterrence and Ashura as providing Shiites with the moral justification for confrontation, while negotiation is presented either as a manifestation of strength or as a deception to be rejected. The Tehran preacher argues that “power speaks first” so that legitimacy can subsequently take its place at the negotiating table. The Qom preacher

invokes the Treaty of Hudaibiyyah to broaden the meaning of victory to include halting the expansion of war and preserving lives, while attacking Saudi Arabia in language far removed from the message of the pulpit and its ethical and religious mission, as well as being at odds with the facts. Meanwhile, Alamolhoda in Mashhad goes so far as to portray negotiation and a ceasefire as merely deceptive tactics, arguing that the only path forward is jihad and resistance. This divergence is not merely a matter of rhetoric; rather, it reflects an internal debate within the Iranian republic over the ultimate objectives of the war and the conditions under which it can be brought to an end.

Resistance as a State Ethos

In these speeches, resistance is not presented as a temporary instrument of foreign policy, but rather as a fundamental principle of the Iranian republic’s identity. The establishment defines itself not only as an Iranian nation-state, but also as the center of an ideological axis stretching from Iran to Iraq, Lebanon, Palestine and Yemen. Thus, the Qom preacher describes the PMF as a “red line” and as a “wilayat al-faqih” force. This designation transforms the PMF from an Iraqi institution operating under the sovereignty of another state into part of a transnational political entity whose identity is defined by its allegiance to Iran’s religious leadership.

The doctrine of Wilayat al-Faqih therefore serves a function that

extends beyond the organization of power within Iran. It provides the establishment with a vision of a broader political sphere encompassing groups that share a common loyalty, enemy and sacred memory. These groups need not be administratively subordinate to Tehran, but the rhetoric places them within a single religious and strategic framework. This is why the Tehran preacher brings the Islamic Revolutionary Guard Corps (IRGC), the Iranian military, Hezbollah, factions in Gaza and the Yemeni forces together within a single rhetorical framework, as though they were multiple units of a single political body. Therefore, the “unity of the arenas” is not merely a form of military coordination, but a worldly manifestation of the unity of the “front of truth” confronting the “front of falsehood,” according to the Iranian doctrine of Wilayat al-Faqih.

There is another dimension related to Ashura, in which the theological framework of resistance is built around invoking Karbala as an interpretive and explanatory model for the present. Alamolhoda does not invoke Imam Hussain merely to recount a historical event, but rather to assert that Hussain’s experience provides a standard for Iranian decision-making today. Just as Hussain, in his interpretation, perceived what his companions who advised him against rising up failed to see, the revolutionary leadership claims to understand the reality of the confrontation with the United States, while those advocating

compromise are portrayed as falling into a “miscalculation.”

Thus, the disagreement over the war is no longer merely a matter of assessing interests and capabilities, but rather a conflict between a reinterpretation of the events of Karbala and short-sighted political calculations. This shift serves two essential functions. First, it shields political decisions from criticism, since opposing them could implicitly be construed as hesitation in supporting Hussain, or even as “treason.” Second, it redefines the meaning of material loss: death, destruction and punishment do not necessarily constitute defeat, because Karbala ended in the martyrdom of Hussain, yet was transformed in Shiite consciousness into a moral and historical triumph. In this way, the religious and political mindset of the loyalists seeks to reshape the concepts of victory and defeat among the public and traditionalist circles.

In this mobilization-driven approach, Iranian political discourse during wartime can distinguish immediate military superiority from ultimate victory, thereby preserving the legitimacy of the confrontation despite its high cost. Sacrifice becomes evidence of the correctness and righteousness of the chosen path, rather than a reason to reconsider it or demand intellectual and political reassessment, let alone political or strategic accountability from decision-makers. The Qom preacher, however, introduces another religious model: the Treaty of Hudaibiyyah.

Invoking Hodaybiyyah is significant in this context because it provides the establishment with a religiously legitimate avenue for de-escalation. Just as the agreement, which some Muslims initially viewed as a concession, could nevertheless be portrayed as a “victory,” a ceasefire or temporary settlement can likewise be presented as a victory. Thus, the establishment’s religious mindset offers two complementary models: Karbala to justify steadfastness, sacrifice and refusal to submit, and Hodaybiyyah to justify a temporary settlement and the regrouping of forces.

Conclusion

Iranian Friday sermons during July 2026 reveal that official and semi-official discourse does not separate Iran’s security from that of its allied groups across the region. The defense of the PMF, praise for Hezbollah and factions in Gaza and Yemen and discussions surrounding the Strait of Hormuz and the unity of the battlefields all reflect a political vision that views the strategic and ideological boundaries of the Iranian republic as extending beyond its geographical borders. This represents a practical application of the doctrine of Wilayat al-Faqih, particularly its all-encompassing version. Therefore, describing the PMF as a “red line” is not merely an expression of solidarity with an Iraqi institution, but rather a declaration that any attack against it would undermine the very structure of the “Axis of Resistance,” of which

Tehran considers itself the political and spiritual center.

This vision enables the doctrine of Wilayat al-Faqih to serve an external function by generating a sphere of shared loyalties and interests without necessarily requiring the direct administrative subordination of all factions within the axis. Furthermore, it becomes clear that resistance, in this discourse, is not an absolute alternative to negotiation, but rather the condition that legitimizes negotiation and determines its timing and outcomes. Acceptable negotiations are those that follow a demonstration of strength, preserve deterrence and do not result in the dismantling of the axis or an admission of defeat. Negotiations perceived as concessions of power or capitulation to US and Israeli pressure are portrayed as deception or miscalculation. Therefore, the disagreement among the preachers of Tehran, Qom and Mashhad appears to be primarily a matter of how they assess the political moment.

Iran and the United States: An Unceasing Game of Mutual Defiance

The ceasefire that had been in place during July 2026 collapsed amid disagreements over the interpretation of the memorandum of understanding signed between Iran and the United States on June 18, 2026. The ensuing military escalation included Iranian attacks on commercial vessels and several nights of inten-

sive US airstrikes targeting Iranian command centers, drone depots and naval infrastructure. In response, Tehran attacked its neighbors — Bahrain, Jordan and Kuwait — while refraining from striking Israel. The blockade imposed by both Iran and the United States on the Strait of Hormuz as a result of the escalation remains in place, driving up oil prices and marine insurance costs and causing shortages of industrial and household supplies amid fears of renewed full-scale hostilities. Having suffered damage to its military industry, Iran has intensified efforts to acquire air defense systems, radars and solid fuel for ballistic missiles from friendly countries such as China and Russia or through the black market. This file examines two main issues: first, the collapsed ceasefire between the United States and Iran; and second, whether the Islamic Revolutionary Guard Corps (IRGC) is re-arming in preparation for a future round of fighting.

Shattered Ceasefire

On July 24, 2026, President Donald Trump announced a halt to strikes on Iran after nearly two weeks of widespread attacks that extended from Tehran to Bushehr, East Azerbaijan, Hamadan, Hormozgan, Khuzestan and Sistan and Balochistan.⁽⁴⁾ The US strikes came in response to an Iranian attack on an oil tanker that forced its crew to abandon the vessel. Iran also continued its attacks on US allies in the region, launching strikes against Bahrain, Jordan and Kuwait while re-

fraining from expanding its attacks to include Israel, which it considers its arch-enemy. At the same time, Tehran directed its proxies in Iraq and Yemen to launch attacks against Saudi Arabia.

During the temporary halt in US strikes, talks in Oman and the diplomatic efforts led by Pakistan through intermediaries made little progress and the blockade of the Strait of Hormuz remains in place. More than 40 commercial and container ship transits were recorded during the last 10 days of July, compared with 82 in the preceding days. On July 29, the United States tightened its blockade and increased pressure on Iranian oil exports by imposing sanctions on several vessels transporting Iranian crude oil and petrochemicals.⁽⁵⁾ Since the time of the Iran-Iraq War in the 1980s, the International Maritime Organization has reported 62 maritime incidents involving commercial vessels transiting the Arabian Gulf, the Strait of Hormuz and the Gulf of Oman.

Despite Iran's insistence on controlling the Strait of Hormuz, its talks with Oman aim to establish a system for regulating maritime traffic similar to the one in place for the Strait of Malacca, which does not involve countries whose coastlines rely on a single port. Despite its shortages of air defense systems and precision-guided medium-range munitions, Tehran is betting that Trump will yield to its pressure before the crucial and highly

anticipated midterm elections in November.

The obstacles facing Oman's efforts to jointly manage the Strait of Hormuz are not limited to Iran's extreme demands; they also include the lack of support from the Gulf states, whose sovereignty and economies depend heavily on freedom of navigation through the strait.

Speculation Over IRGC Rearmament

Analysts unanimously agree that the likelihood of renewed fighting after the end of the tactical pause is very high. While the United States is strengthening its air defense systems and stockpiling offensive munitions, Iran is turning to its traditional sources of weapons, including the black market, as well as Russia, China, North Korea and Belarus.

Reuters reported that Iran acquired up to 400 Chinese-made shoulder-fired missile launchers worth between \$60 million and \$70 million.⁽⁶⁾ According to a report citing informed sources, the deal with Zhongqing Baoshang International Invest Limited, a Hong Kong-based company, includes the purchase of 300 to 400 man-portable air defense systems (MANPADS), including the Chinese-made QW-12 and FN-16 missiles. The Chinese Foreign Ministry denied the reports, describing them as completely unfounded.

The MANPADS in question are shoulder-launched, infrared-guided surface-to-air missile systems

designed to target low-flying aircraft, helicopters and drones. Iran is seeking other types of these systems, but China is unwilling to risk supplying Tehran with a multilayered air defense system while its relations with the United States remain cooperative, particularly ahead of President Xi Jinping's planned visit to Washington in mid-September.

Another report stated that Iran had already received hundreds of shoulder-fired surface-to-air missiles from China and Russia during recent ceasefire periods.⁽⁷⁾

Reports also indicate that Iran's IRGC acquired three types of shoulder-fired air defense systems during Iranian Foreign Minister Abbas Araghchi's visit to Beijing last May, with deliveries from Russia and China reportedly taking place in mid-June. The reports further allege that the Iranian military used one of the Chinese systems to shoot down a US-made Lucas drone near Bandar Abbas on July 13. It also states that Iran received approximately 300 Russian-made 9K333 Verba shoulder-fired air defense systems in five small shipments transported via the Caspian Sea. Reuters had previously reported that Iran was seeking anti-ship cruise missiles, but the deal ultimately fell through because of the significant risks involved.⁽⁸⁾

Conclusion

Signs of war fatigue are evident on both sides of the conflict, but the hardline positions of both parties

continue to prevent common ground from emerging. The United States may find itself compelled to take into account the concerns of its allies, who have borne the brunt of the consequences of the war launched by Washington alongside Israel. For Iran, there is another reason to continue fighting: the potential for popular protests amid deteriorating domestic conditions. The Iranian establishment has demonstrated in recent years its ability to use external threats and aggression to ease internal political pressures. As for the United States, its allies expect Washington to prevent the conflict from becoming an endless war while also avoiding a prolonged stalemate.

The Iranian Establishment's Dwindling Social Capital

In light of the current crisis, Iranian media have warned that the country has entered an unprecedented critical phase. The external war is no longer the greatest threat facing the Iranian establishment; instead, it has exposed the depth of the internal crises that have accumulated over time, most notably the erosion of social capital, the collapse of trust and the fragility of the relationship between the state and the public. This has become particularly evident amid the economic, social, psychological and security pressures generated by the war, which have put the system's legitimacy and stability to the test and challenged its rhetoric of national cohesion. Accordingly, this file examines the issue in two main sections: the impact

of the war on the erosion of social capital, and the repercussions of that erosion for the establishment's legitimacy and stability.

The War's Damaging Social Repercussions

The resumption of the war has accelerated the erosion of social capital in Iran, shifting society from a state of anticipation for de-escalation to one of daily exposure to the effects of conflict. The new round of fighting has been accompanied by the collapse of avenues for understanding, renewed military strikes and retaliatory attacks, making war a constant presence in citizens' lives.

This has coincided with high inflation, reaching 87.9% according to the Statistical Center of Iran;⁽⁹⁾ declining purchasing power; soaring prices; job insecurity; economic, social, security, political and psychological uncertainty; economic stagnation; currency collapse; widespread unemployment; declining incomes and the resulting proliferation of informal and temporary jobs; falling life satisfaction; the collapse of the middle class; a weakened education system; deterioration in the environmental and energy sectors; declining health care and deficiencies in medical services and personnel; widespread corruption, crime, and social deviance; ambiguity and divisions within the establishment; mismanagement of the country; and migration and displacement, which the UN estimates has reached approximately 3.2 million people,⁽¹⁰⁾ particularly among intellectuals and elites, leaving profound transformations in its wake.

Demographic changes, the politicization of religion, social issues such as human rights and the hijab, the erosion of human values and growing generational divides, as well as international sanctions and the crises they generate, have further deepened the sense among citizens that they are bearing the cost of choices over which they have no control. Under these circumstances, vertical trust between society and the state is eroding, while horizontal bonds among citizens are weakening.

The war has also exposed the limits of the political system's ability to turn external threats into sustained national cohesion. While rhetoric centered on defending the state may generate temporary support, that support quickly fades as the gap widens between the official narrative of resilience and the daily experiences of citizens burdened by internal crises. The establishment's escalating violence and repression, together with pervasive censorship in the streets, Iranian media and social media, have further eroded public trust and support, creating fertile ground for a surge in protests and uprisings.

This erosion is compounded by the Iranian government's heavy reliance on the security and military sectors, which receive a disproportionate share of the national budget compared with spending aimed at addressing social and economic problems. This further reinforces feelings of alienation and fear among citizens, contributing to a loss of hope for the future and reducing their willingness to make sacrifices for policies they view as unjust or opaque.

Implications for the Establishment's Legitimacy and Stability

The erosion of social capital in Iran poses a direct challenge to the establishment's legitimacy and stability by weakening mutual trust between society and the country's governing institutions. It also limits the state's ability to mobilize citizens and manage crises effectively. The problem is no longer merely social; it has become political, striking at the core of the system's legitimacy. It is closely tied to the extent to which citizens are convinced by and accept state policies, as well as the effectiveness of state institutions and their ability to protect citizens' interests.

A survey conducted in May 2026 on levels of discontent, declining hope for the future, public anger and trust in state institutions found that trust had fallen to approximately 25.4% in government institutions, 23.1% in Parliament, 30.8% in the judiciary and 28.8% in national media. These figures underscore that social capital — the most important pillar of governance and national cohesion — requires greater attention and efforts to rebuild public trust, particularly because it is the primary driver regulating the relationship between society and official institutions.⁽¹¹⁾

While security and media-control measures may temporarily ease tensions and pressures to some extent, they are extremely difficult to use to address the crisis of confidence or achieve lasting stability. In fact, relying on such measures only deepens the sense of political alienation and weakens society's

willingness to cooperate with the state during crises.

The danger of this erosion lies in its impact on the groups that typically constitute the foundation of social stability in the country, including young people, low-income groups, the middle class and workers. These groups do not view crises solely through the lens of political or security rhetoric, but rather through their direct impact on employment, wages, prices, housing, health care, education and services. As social, economic and security pressures intensify and infrastructure is damaged by war, the perception grows that society is bearing the cost of public policies without genuine participation in decision-making or fair guarantees of protection and compensation.

Moreover, the declining credibility of the official narrative, restrictions on the media and digital spheres, and tighter censorship weaken the state's ability to contain public anger and build national consensus around its choices. When citizens feel that information is incomplete or inaccurate, they turn to alternative sources, further reducing the ability of official institutions to manage public anger. This increases the likelihood that protests will escalate from immediate demands for improved living conditions to broader demands directed at the head of state and focused on the fairness and effectiveness of the system.

Consequently, the establishment's continued existence does not necessarily guarantee the restoration of its legitimacy, just as apparent calm does not signify lasting stability. Stability based on

deterrence and violence remains fragile in the face of any economic, security, or service-related shock. Rebuilding social capital therefore requires a shift from a rhetoric of resilience toward concrete policies that ease the burdens of daily life, meet citizens' needs, strengthen transparency and credibility and expand channels for participation and accountability. Such a shift would allow the exercise of power to be transformed into more sustainable political acceptance.

Conclusion

Iran is currently experiencing a severe depletion and erosion of social capital and a loss of public trust, resulting in a structural internal crisis. The state of war is further entrenching and deepening this crisis, pushing the establishment toward either changing its current policies or confronting societal pressures for change. The Iranian establishment is aware of these risks and is working to balance them against its military options, as reflected in government efforts to ease the cost of living, enhance transparency and accountability, respect legitimate rights and freedoms and combat corruption. However, important elements remain absent from this equation, including opening genuine channels of dialogue with the public and moving away from repression and security mobilization, which only widen the gap between the state and society. Hence, the establishment's stability and survival depend on its ability to rebuild its relationship with society.

IRAN-ARAB INTERACTIONS

Iran's relations with several Arab and regional states witnessed significant developments during July 2026. In the Gulf, the month saw a new wave of escalation between Iran and its Arab neighbors following the collapse of the US-Iranian memorandum of understanding. In Iraq, the prime minister undertook three foreign visits during July: first to the United States, second to Türkiye and third to Iran. These developments reflected the new government's approach of developing a strategy that balances its foreign relations and distances Iraq from the specter of the war between the United States and Iran. In Syria, the seizure of an arms shipment suspected of being destined for Hezbollah, together with Tehran's announcement that it had targeted al-Tanf, highlighted Iran's growing need for the Syrian arena, particularly amid its ongoing conflict with the United States. Yemen witnessed an unprecedented shift, marked by Iran's renewed activation of the Houthi card as part of its strategy to expand the scope of the conflict and open a new pressure front in the Red Sea and Bab al-Mandab, alongside the Strait of Hormuz. Regarding Iranian-Israeli interactions, the recent military confrontations revealed that both Iran and the United States had sought to exclude Israel in the conflict equation during this phase. Trump prevented Israel from entering the war, while Iran, in turn, excluded it from its list of targets.

Iran Expands the Scope of Threats to Gulf Nations

July 2026 witnessed a new wave of escalation between Iran and its regional neighbors following the collapse of the US-Iranian memorandum of understanding, brokered by Pakistan on June 18, 2026. Iran resumed its attacks, targeting civilian infrastructure and vital facilities in several Gulf states and Jordan, while also mobilizing its proxy militias in Yemen to target countries across the region. This reflects Tehran's strategy of creating and expanding regional crises to increase the costs of the war against the United States.

Accordingly, this file examines two main issues: first, the resurgence of Iranian attacks against neighboring countries; and second, Tehran's policy of expanding the scope of instability across the region.

Iran Resumes Attacks on Gulf Neighbors

The Gulf Cooperation Council (GCC) states, foremost among them Saudi Arabia, have consistently reaffirmed their commitment to good-neighborly relations, respect for state sovereignty and non-interference in the internal affairs of other countries. This commitment has extended beyond political rhetoric and been demonstrated in their conduct during recent periods of conflict. They refrained from taking military action against Iran and did not allow their territories or airspace to be used to launch attacks against it. In this

context, the participation of delegations from Saudi Arabia, Qatar and Oman in the memorial service for the former Iranian Supreme Leader Ali Khamenei on July 3, 2026, further underscored the Gulf states' continued adherence to a policy of good neighborliness and their commitment to maintaining open channels of political and diplomatic communication. This approach reflects their conviction that regional stability requires managing differences through dialogue and mutual respect rather than escalation or the severing of relations.

However, this Gulf approach of restraint and strategic patience was not met by a corresponding change in Iranian behavior. Iran and its affiliated armed groups continued to attack and target civilian infrastructure across the region, underscoring the persistent gap between Gulf calls for de-escalation and Iran's conduct on the ground.

Against this backdrop, Tehran returned to an escalatory approach on July 7, 2026, adopting policies and actions that reignited regional tensions. These included attacks on a Qatari gas tanker and a Saudi oil tanker while they were transiting Omani territorial waters, as well as attacks on two Emirati oil tankers that resulted in the death of their Indian captain and several other crew members. Iran also repeatedly launched missile attacks against Kuwait, Bahrain and Jordan, damaging power plants, desalination

facilities and oil and gas infrastructure.

Adding to this destabilizing approach, Iranian Foreign Minister Abbas Araghchi visited Oman on July 11, 2026, seeking to impose arrangements that would give Iran control over the Strait of Hormuz by levying transit fees. The proposal was rejected by Oman in accordance with international norms and the 1982 United Nations Convention on the Law of the Sea (UNCLOS). Following the rejection, Iran escalated its actions against Oman on July 12, 2026, targeting the governorates of Musandam and Al Wusta.⁽¹²⁾ The escalation prompted Oman's Ministry of Foreign Affairs to summon Iranian Ambassador Mousa Farhang and deliver a formal protest condemning the attack.

This behavior is not merely a temporary response to changing circumstances; rather, it represents a continuation of a consistent Iranian approach aimed at asserting regional hegemony while disregarding repeated Gulf calls for restraint and diplomatic initiatives intended to de-escalate tensions and preserve regional security and stability.

Expanding Tensions in the Region

In its effort to reshape the security environment in the Arabian Gulf and the wider region, Iran has intensified regional crises and sought to impose new realities on the ground, not only

to expand its geopolitical influence but also to ease the mounting pressure surrounding its nuclear and ballistic missile programs and its destabilizing regional conduct. As part of this approach, Tehran has sought to divert international attention from its core points of contention by creating new security crises, expanding tensions along international maritime routes and turning them into instruments of pressure and leverage against the international community.

Against this backdrop, and amid attacks on vessels transiting the Strait of Hormuz, Tehran has sought to widen the scope of instability to the Red Sea and the Bab al-Mandab Strait. Its affiliated Houthi terrorist militia targeted Saudi vessels in the Red Sea and attacked areas in southern Saudi Arabia, prompting a measured military response from the forces of the Coalition to Support Legitimacy in Yemen.

This behavior was not confined to Yemen but extended to Iraq, where Iran-backed militias⁽¹³⁾ continue to conduct activities that threaten the security and stability of neighboring countries. These activities form part of an Iranian agenda aimed at destabilizing the regional environment and preventing Iraq from reintegrating into its regional sphere.

More recently, the situation escalated dangerously as Iraqi militias

aligned with Iran targeted oil and vital facilities inside Saudi Arabia using drones. In response, the kingdom issued two statements on July 27 and July 28, 2026, reaffirming its commitment to responding firmly to all forms of aggression and confronting every source of threat in order to protect its national security and preserve regional stability. On July 29, the kingdom carried out precision strikes against targets belonging to Iran-backed terrorist militias in Iraq, exercising its right to self-defense under international law, specifically Article 51 of the UN Charter. The kingdom also emphasized that it does not seek escalation but will respond to any aggression directed against its territory.

Conclusion

Tehran is employing a range of tactics to pressure the United States and regional states, seeking to prevent the confrontation from remaining confined to Iranian territory and instead turn it into a broader regional crisis. Such an expansion would substantially increase the cost of political pressure against Iran. This behavior reflects a recurring pattern in Iranian strategy: internationalizing its internal and external crises and turning the pressures it faces into threats to regional security and international economic interests, particularly energy security and global supply chains.

Iranian behavior therefore cannot be viewed as a series of isolated events, but rather as part of a broader

strategy aimed at destabilizing the regional environment and creating new sources of leverage, even at the expense of national sovereignty, freedom of international navigation and the principles of international law. Against this backdrop, Tehran does not appear to regard the Gulf states' policy of good neighborliness as an opportunity to build trust or place relations on a more stable footing. Instead, it has continued its policies of pressure and escalation by targeting Gulf states, either directly or through regional proxies, reflecting a lack of genuine political will to bring about a meaningful change in its regional conduct.

Continued reliance on this approach could weaken the effectiveness of unilateral Gulf initiatives and constrain their ability to achieve their objectives of building trust and reducing tensions. This, in turn, may prompt the Gulf states to reassess their strategic options and instruments for managing relations with Iran, shifting from policies centered on diplomatic initiatives and confidence-building toward a more assertive approach focused on addressing sources of threat while safeguarding the stability and national security of the Gulf states.

Dimensions of Zaidi's Visit to Washington, Ankara and Tehran

July 2026 saw three foreign visits by Iraqi Prime Minister Ali al-Zaidi to the United States, Iran and Türkiye.

The visits were part of the new government's approach to developing a strategy that balances Iraq's foreign relations and keeps the country away from the specter of war between the United States and Iran. This raises several questions, most notably: what were the dimensions of the three visits, and how did their outcomes compare? To what extent was Zaidi able to resolve the outstanding issues with each of the three countries during his visits?

Outcomes of Zaidi's Visit to Washington

Zaidi visited Washington from July 13 to July 17, 2026, in what observers described as the largest visit by successive Iraqi prime ministers to the United States in the post-2003 period. The assessment was based on the scale of his reception at the White House and the broad political support he received from President Trump and his administration, following an understanding on sensitive security and economic issues related to Trump's demands to reduce the influence of paramilitaries and restrict weapons to the state. This, in turn, created divisions and political pressure on Zaidi from pro-Iran militia parties inside Iraq.

This was also reflected in the scale of the agreements and memoranda of understanding reached during the US-Iraq Business Summit hosted by the US Chamber of Commerce, where the two sides signed 48 economic agreements and memoranda of understanding worth \$60 billion.

Among the most prominent were an agreement between Iraq's ministries of oil and electricity and US companies; an agreement granting Starlink a license to provide satellite internet services in Iraq; and an agreement between the US Treasury Department and the Central Bank of Iraq to lift US sanctions on seven Iraqi banks that had been subject to US restrictions.

Additional agreements were reached in the energy sector, including an oil agreement for a route that bypasses the Strait of Hormuz and a memorandum of understanding with Syria to transport Iraqi oil to the Syrian port of Baniyas. These agreements would allow US companies to establish an unprecedented presence in strategic sectors in Iraq, including energy, technology and electricity. Zaidi also succeeded in reaching important security and military understandings during his talks with Secretary of War Pete Hegseth. Reports indicated that the two sides had reached understandings on an US-Iraqi security partnership that would continue after the deadline for the complete withdrawal of US forces from Iraq and would include strengthening the US role in training and equipping the Iraqi army, as well as enhancing security and intelligence coordination.

Those opposed to the visit, particularly pro-Iran militias and Iran itself, view the agreement with suspicion and remain uncertain about the future of their influence in Iraq. Factions such as Iraqi Hezbollah, Kata'ib Sayyid al-Shuhada and

Harakat al-Nujaba have categorically rejected the outcomes of the visit and launched an organized media campaign against Zaidi. Ali Akbar Velayati, an adviser to Iran's supreme leader, also criticized the visit, describing Zaidi as "inexperienced" and adding, "Zaidi's behavior during his meeting with the American president shortly after the funeral of the former Supreme Leader, Ali Khamenei, is a great disgrace."⁽¹⁴⁾

Iran fears that these developments could undermine its influence in Iraq, which forms part of its broader expansionist strategy. Its concerns have intensified because they are unfolding amid the weakening of its regional axis. Tehran also recognizes that even the limited implementation of the agreements reached could redefine US-Iraqi relations and elevate bilateral ties between to a new level at the expense of relations with Iran, particularly if measures are taken to curb the smuggling of funds to Iran under the agreement signed between the Central Bank of Iraq and the US Treasury Department.

Iran and its proxies in Iraq also recognize that if the outcomes of the visit are implemented on the ground, Zaidi may go beyond maintaining a balance and instead reorient Iraq's strategic compass toward the United States. This would strengthen Zaidi's position on issues of corruption and the state's monopoly over arms. Shifting the relationship from a security-focused partnership toward an economic and commercial one would also

reinforce the US desire to confront the entrenched militia domination in Iraq.

However, the success of this shift will depend not only on the outcomes of Zaidi's visit to Washington, but also on the Iraqi government's ability to implement them on the ground. The Iraqi state faces complex structural challenges, foremost among them the multiplicity of decision-making centers resulting from the pervasive militia presence within state institutions and governing bodies, militia concerns over the new geographical reality along the northern borders, rampant corruption and inadequate public services. Together, these factors have created major dilemmas for successive governments, undermining the efficiency of state institutions and their ability to attract investment and build confidence with international partners.

Significations of Zaidi's Visit to Iran

Zaidi's visit to Tehran on July 25, 2026, during which he met with President Masoud Pezeshkian and Parliament Speaker Mohammad Bagher Ghalibaf, resulted in the signing of only two agreements: one on land transportation and another on preparing a document for long-term strategic cooperation. The visit also resulted in three memoranda of understanding covering railway connectivity, including the establishment of a railway line linking Khanaqin and Baghdad with Iran's Khosravi, the acceleration of work on the Shalam-

cheh-Basra railway line and administrative twinning.

Security was the main focus of discussions between Zaidi and Pezeshkian who urged Zaidi to implement the security agreement, particularly its provision on the withdrawal of Kurdish factions from the border areas, which Iran regards as hostile. Zaidi, for his part, pledged that no part of Iraq would become a source of threat to Iranian territory. This pledge is particularly important to Iran, which fears that Kurdish opposition groups could be encouraged to act against it amid the US-Iran conflict, potentially creating instability along the border that could undermine Iranian sovereignty and weaken Tehran's position in its confrontation with Washington.

Zaidi thus reaffirmed his government's relationship with Iran without allowing the visit to amount to an alignment with either side in the US-Iran conflict, particularly given reports of limited progress toward a security and political breakthrough on the visit's key issues: the militias and Iraqi oil exports through the Strait of Hormuz.

Outcomes of Zaidi's Visit to Türkiye

Zaidi's visit to Ankara on July 28, 2026, during which he signed five agreements in the energy, transportation and education sectors, demonstrated a Turkish-Iraqi desire to strengthen strategic cooperation and elevate bilateral relations from managing existing ties to building partnerships.

The two sides emphasized their commitment to activating the Joint Strategic Cooperation Council and holding its fifth meeting in Baghdad. They also signed two agreements to resume the Development Road project⁽¹⁵⁾ and three memoranda of understanding covering security training, youth and industrial property.

The visit was of great importance to Iraq as it sought to strengthen rail links and diversify its oil export routes, particularly after Iran's closure of the Strait of Hormuz to Iraqi oil exports, at a time when Iraq is facing economic and living crises. The two sides discussed the possibility of increasing the capacity of the Kirkuk-Ceyhan oil pipeline. The Turkish president said Zaidi had informed him that Iraq would double its oil exports through the pipeline to 1 million barrels per day, meeting a key Turkish demand that Ankara has pursued for years.

Ankara is also considering supplying Iraqi power plants with natural gas, amid the summer crisis facing Iraq's electricity sector as a result of shortages in gas supplies from Iran. Erdogan confirmed that the Turkish Petroleum Corporation (TPAO) had acquired an approximately 15% stake in the Kirkuk Energy Company (BP) to participate in production at the Kirkuk oil field. Erdoğan described the move as a "historic step" in energy partnerships.⁽¹⁶⁾

In connection with the above, Erdogan confirmed that the framework agreement for cooperation in

the water sector would soon be activated, along with a mechanism to finance Iraqi water infrastructure projects using revenues from Iraqi oil exports to Türkiye, as stipulated in the agreement, beginning September 1, 2026. Under the agreement, specialized Turkish companies are expected to implement these projects, including the construction of dams and the development of water-management facilities. The two sides also agreed to expand bilateral trade, which currently favors Turkey and stands at \$17 billion, according to Erdogan, with the goal of increasing it to \$30 billion annually. Zaidi said relations with Ankara would undergo further development, becoming a “third river” between the two countries.⁽¹⁷⁾

One of the clearest indications of Iran and its proxies' displeasure with the visit's outcomes was the hesitation of Iraqi Transport Minister Wahab Salman to sign the two agreements on resuming the Development Road project. His hesitation caused embarrassment during the signing ceremony, particularly because the minister belongs to the Badr Organization alliance led by Hadi al-Amiri, who is close to Iran.

In this context, Tehran fears the implementation of cross-border projects in Iraq that it does not control and that conflict with its plans for the country. Iran also views the visit's outcomes as evidence that Baghdad and Ankara are determined to invest in their strategically important bilateral relationship and to move beyond

managing disagreements toward building strategic partnerships in energy, water, the economy, and regional coordination. Türkiye and Iraq occupy a geostrategic position that could play a prominent role in reshaping energy balances and redrawing economic and trade maps, at a time when the Zaidi government says its primary objective is to pursue stability and development.

Conclusion

Through his foreign visits, Zaidi sought to put into practice the principle of restoring balance to Iraqi foreign policy and moving away from a policy of competing axes. However, his visits were more heavily focused on strengthening relations with Washington, where he signed about 48 strategic and diverse agreements and memoranda of understanding with the US side. He also signed five significant agreements and memoranda of understanding in Ankara, while in Iran he signed two agreements and three memoranda of understanding in non-strategic areas.

His visit to Iran was described as failing to achieve a meaningful breakthrough, particularly because it did not address the issues of dismantling militias and exporting Iraqi oil through the Strait of Hormuz. Iran has insisted on using the Iraqi oil issue as a tool of international pressure by reducing the share of oil supplied to global markets in order to increase economic pressure on Western capitals, particularly Washington, in the

hope of reaching a settlement that serves Iranian interests.

Iranian Moves in Syria Following the Resumption of Conflict

Two simultaneous developments in Syria during July 2026 brought the issue of Iranian influence in the country back to the forefront. The first was Damascus' announcement that it had thwarted an attempt to smuggle a shipment of sophisticated weapons across the Iraqi border. The second was the Islamic Revolutionary Guard Corps' (IRGC) announcement that it had targeted a U.S. command center in the al-Tanf region, a claim denied by both Damascus and Washington.

This file first examines the seizure of the weapons shipment and the IRGC's announcement regarding the targeting of the al-Tanf base, before analyzing their implications in the context of Iran's attempts to use the Syrian arena in response to US pressure, despite its diminished presence there since the fall of Bashar al-Assad's regime.

Syria Seizes Arms Shipment, Iran Targets al-Tanf Base

The Syrian Interior Ministry announced that it had thwarted an attempt to smuggle a large shipment of sophisticated weapons across the Syrian-Iraqi border. According to initial investigations, the weapons, concealed inside an oil tanker, were intended to be transported through Syrian territory to Hezbollah in Lebanon. Syrian authorities said the

shipment included long-range missiles, anti-tank guided missiles, and drones. The ministry affirmed that Syria would not allow its territory to be used as a corridor for arms smuggling or as a launching pad for activities that threaten the security of the country and neighboring states.⁽¹⁸⁾

In contrast to the Syrian account, Hezbollah categorically denied any connection to the shipment or any activity on Syrian territory, describing the allegations against it as "untrue."⁽¹⁹⁾ Iraqi authorities also announced the formation of a committee to investigate the incident, given information indicating that the shipment originated in Iraqi territory and may have been connected to pro-Iranian factions.

The context of renewed escalation between the United States and Iran gives the incident significance beyond that of a routine smuggling operation. As the US-Iran confrontation widens and Iran's military assets come under direct pressure, maintaining the readiness of allies and proxies becomes increasingly important as a means of deterrence and of distributing pressure across multiple fronts. From this perspective, the attempted transfer of weapons — if its connection to Iranian networks is confirmed — can be understood as part of an effort to preserve Hezbollah's military capabilities and prevent it from becoming isolated from Iranian supply sources during an escalation.

The method of concealing the shipment inside an oil tanker also reveals

how Iranian supply networks have adapted to the loss of the political and security cover that Iran and its militias previously enjoyed in Syria under Bashar al-Assad. Instead of using border crossings, bases, and depots almost openly, these networks are now forced to operate through trade and energy flows between Iraq and Syria. This means that the cycle of escalation and de-escalation between the United States and Iran has increased Tehran's need for the Syrian corridor while simultaneously restricting its ability to use it.

One day after the shipment was seized, the IRGC announced that it had targeted what it described as a U.S. special operations command center in the al-Tanf region of southeastern Syria, saying the operation was "in response to the killing of Iranian soldiers in Iranshahr."⁽²⁰⁾ Tehran thus directly linked the announced operation to the war with the United States, presenting it as an extension of its military response beyond Iranian territory.

However, a Syrian military source reported that the strike did not hit the al-Tanf base and caused no casualties, while US Central Command denied that its forces had been targeted or that any of its soldiers had been killed or captured.⁽²¹⁾ Despite the conflicting accounts, the choice of al-Tanf indicates an Iranian attempt to incorporate Syrian territory, albeit to a limited extent, into the theater of retaliation against the United States. The area lies at the intersection of the

Syrian, Iraqi, and Jordanian borders and is historically linked to the struggle for control of Iran's land corridor. The Iranian announcement therefore combined a response to US strikes with an effort to reassert the symbolic significance of a region that had previously hindered geographical connectivity between Iran and its allies in Syria and Lebanon.

Significations in Light of the US and Iran Resuming Escalation

The developments reveal, first, that the war has deepened the contradiction between Iranian needs and Syrian priorities. As US strikes escalate, Tehran's need to leverage its network of allies and supply lines stretching across Iraq, Syria, and Lebanon is growing, as is its desire to distribute military pressure on US forces across multiple fronts. Damascus, by contrast, believes that allowing its territory to be drawn into the conflict could invite US or Israeli strikes and undermine its efforts to restore stability and rebuild relations with Arab states and the international community.

Second, the developments reveal that Syria has shifted from being a strategic depth for Iran to becoming a constraint on its ability to manage the war regionally. Previously, Tehran was able to use Syrian territory to supply Hezbollah and deploy its forces and allied factions. During the current escalation, however, it has been forced to rely on clandestine smuggling operations that Syrian intelligence

agencies are working to intercept. Syria is therefore no longer simply a link within Iran's sphere of influence; it has become a barrier limiting connectivity between its Iraqi and Lebanese arenas.

Third, the war has increased Hezbollah's importance in Iranian calculations while simultaneously reducing Iran's ability to support it. Hezbollah remains one of Iran's most prominent tools of deterrence beyond its borders and can play a role in deflecting U.S. and Israeli pressure. However, the closure of the Syrian corridor reduces its ability to replenish lost weapons and ammunition and limits its capacity to rebuild its arsenal. The struggle over supply lines inside Syria therefore affects Iran's ability to manage the war beyond its borders and extends beyond the future of its influence within Syrian territory.

The fourth implication is Iran's growing reliance on military and media messaging to compensate for its diminished presence on the ground. Announcing the targeting of al-Tanf, even without confirmed results, allows Tehran to demonstrate that US strikes will not go unanswered and that it remains capable of expanding the geographic scope of the confrontation. The announcement also carries an indirect message to Damascus: declaring neutrality and closing supply lines does not necessarily guarantee Syria's exclusion from Iran's retaliation calculations.

Conclusion

Developments in Syria over July demonstrate that the US-Iran conflict has increased Tehran's need for Syria while simultaneously exposing its diminished ability to use it. The interception of the arms shipment highlighted the difficulties Iran faces in maintaining its supply line to Hezbollah, while the announcement of the attack on al-Tanf demonstrated its attempt to incorporate Syrian territory into its response to Washington, at least at the level of military and media messaging.

These developments therefore indicate Iran's effort to prevent the complete loss of its former influence in Syria at a time when it is under direct US military pressure. Damascus, by contrast, is using this moment to consolidate its sovereignty and sever Syria's ties with the network of Iranian proxies while avoiding direct involvement in the war. The competition is likely to continue in the form of a low-intensity security conflict along borders and supply lines, with the potential for escalation as the current conflict drags on and Iran's need to activate its regional fronts grows.

Iranian Leverages the Houthis Following US Threats

The Yemeni arena witnessed an unprecedented turning point in July 2026, the first since 2022. This was marked by Iran's attempt to activate the Houthi front through military escalation against the Saudi Arabia and

by threatening international navigation in the Bab al-Mandab Strait, as part of the coordinated fronts of what is known as the Iran-backed “Axis of Resistance.”

The escalation began as Iran sought to circumvent the airspace embargo imposed by Yemen’s legitimate government by landing a Mahan Air aircraft in Sana’a on July 3, 2026, ostensibly to transport Houthi delegations attending the funeral of the Iranian supreme leader. This was followed by a series of developments that culminated in an escalation of military activity inside Saudi territory and Houthi attacks on Saudi vessels in the Bab al-Mandab Strait. The operation appeared to reflect a broader Iranian strategy to activate its Houthi proxy and open the Red Sea and Bab al-Mandab front, much as it had sought to leverage the Strait of Hormuz, in order to strengthen Iran’s bargaining position in its ongoing conflict with the United States.

Thus, this file examines the dimensions of Iran’s strategy to activate the Houthi card, as well as the Houthis’ motives for activating the Red Sea and Bab al-Mandab front.

Iran’s Activation of the Houthis — Strategic Dimensions

On July 3, 2026, an Iranian aircraft landed at Sana’a Airport for the first time in approximately 11 years, in an apparent violation of the ban imposed by Yemen’s legitimate government on Iranian aircraft since 2015, as well as UN Security Council

Resolution 2216, which prohibits the supply of weapons to the Houthis. In this regard, Rashad al-Alimi, head of Yemen’s Leadership Council, stated that the Iranian aircraft was carrying a delegation of IRGC commanders to Sana’a, along with communications experts, advanced electronic technologies, and precision-guidance chips.⁽²²⁾

The escalation reached its peak when Iran attempted to land another aircraft on July 13, 2026. However, the Saudi-led coalition and the Yemeni Air Force prevented it from landing by targeting the runway at Sana’a Airport, forcing the aircraft to land at Hodeidah Airport. This constituted another violation and demonstrated Iran’s desire to reignite tensions and create a pretext for further escalation.

The incident was followed by Houthi attacks on Abha Airport inside Saudi Arabia, while the Houthi spokesperson announced what he called a “maritime blockade against Saudi shipping” on July 20, 2026. The military escalation continued, with the militias targeting two Saudi ships transiting the Bab al-Mandab Strait on July 22-24, 2026.

A few hours after the second ship was targeted, on the night of July 24 to July 25, 2026, coalition forces carried out a firm and proportionate military response. The operation involved concentrated airstrikes against Houthi military facilities and positions along the coast, on Kamaran Island, and at the communications building in Hodeidah, which were being used to

threaten and launch attacks against maritimetraffic.⁽²³⁾

By examining the implications and timing of the escalation, as well as Iran's role in instigating the crisis, it can be argued that the Houthi escalation against Saudi Arabia, the Bab al-Mandab Strait, and the Red Sea formed part of an Iranian strategy aimed at drawing Yemen and the Yemeni people, through its Houthi proxy, into the conflict with the United States. The strategy seeks to expand the conflict's geographic scope from the Arabian Gulf, the Strait of Hormuz, and the Arabian Sea to Yemen and the Bab al-Mandab Strait. This connection can be summarized as follows:

A "Strait-for-Strait" Equation

Following the closure of the Strait of Hormuz, Saudi Arabia and the Gulf states turned to alternative shipping routes through the Red Sea and overland pipelines to circumvent the crisis. Iran consequently instructed the Houthis to activate the Bab al-Mandab and Red Sea fronts in an effort to close this alternative maritime route and implement a "blockade for blockade" strategy. The aim was to increase pressure on global oil and trade routes and create an international economic environment that would place additional pressure on the United States.

Turning Saudi Arabia Into an Alternative Arena for Applying Pressure

Given Saudi Arabia's role as a key US partner and ally in the region,

Iran directed its indirect escalation "through the Houthis" toward Riyadh as a means of pressuring the U.S. administration to lift the blockade or, at a minimum, refrain from potential attacks on Iranian infrastructure.

Raising Energy Prices and Exerting Pressure

Against the backdrop of the closure of the Strait of Hormuz, which has disrupted 20% of global oil exports, Iran's strategy of threatening navigation through the Bab al-Mandab Strait and the Red Sea aims to drive up global energy prices, thereby increasing pressure on the US administration and the international community and encouraging a compromise with Washington. This is particularly significant because higher energy prices can also intensify pressure on the US domesticfront.⁽²⁴⁾

Houthi Motivations for Opening the Red Sea and Bab al-Mandab Fronts

The Houthi position is not limited to supporting Iran's strategy; it is also driven by shared interests and considerations related to the Houthis' internal position, whether at the economic, political or military level:

Politically

Despite the alignment of strategic interests between Iran and the Houthis, the latter do not openly acknowledge that their escalating actions serve Iran's strategy. Instead, they frame their actions within a narrative of an alleged siege and the "Saudi enemy," seeking to rally domestic support and broaden popular mobilization around

Houthi ideology. This was evident in the pro-Houthi demonstrations in al-Sabeen Square, where militia leaders resorted to fabricating pretexts and justifications to divert attention from widespread public resentment over Houthi practices and Yemen's dire internal conditions, marked by poverty, unemployment, and severe shortages of supplies and food — all of which are rooted in the Houthis' exclusionary agenda.⁽²⁵⁾

In this regard, the Saudi Ministry of Foreign Affairs rejected Houthi claims that Saudi Arabia was imposing a blockade on Yemen. The ministry stated that, over the past years, the kingdom had worked with the legitimate Yemeni government to alleviate the suffering of the Yemeni people by continuing development projects and supporting the government's budget. It added, "During the first half of 2026, the ports in northern Yemen — Hodeidah, Salif and Ras Issa — received more than 300 ships carrying various foodstuffs, goods, fuel, and building materials," while continuing to operate in accordance with UN Security Council Resolution 2216 to prevent the entry of weapons and ammunition that the Houthi militia was attempting to bring into Yemen by all means to prolong its control over the resources of the Yemeni people.⁽²⁶⁾

Economically

Amid the Houthi militia's crippling economic crisis and growing public discontent, their declaration of a naval blockade against Saudi Arabia

appears aimed at achieving several economic objectives while easing popular resentment toward them. Among the most prominent is an attempt to pressure the Yemeni government into granting the Houthis a share of its oil and gas revenues, particularly amid high energy prices, to help finance the militias and pay the salaries of their armed elements in areas under their control. The Houthis are also seeking to impose transit fees on commercial vessels and turn a vital international waterway into a sustainable source of revenue to support their military interests.⁽²⁷⁾

Militarily

The Houthi militia's declaration of a naval blockade and their escalation against Saudi Arabia are linked to several military objectives, particularly following the shift in the military and political balance of power in favor of Yemen's legitimate government in early 2026. This shift represents the most significant threat to the Houthi presence at present, compounded by unprecedented tribal resentment toward the group in Al-Jawf and Amran. These internal pressures have driven the Houthi militias to create an external enemy to rally their followers, divert attention from mounting domestic challenges, and impose a state of emergency, general mobilization, and stringent military measures. They have also established checkpoints to suppress potential rebellion and break the internal military and tribal encirclement that has begun to form around them.⁽²⁸⁾

Conclusion

The escalation during July 2026 resulted from the convergence of Iranian and Houthi interests. Iran sought to use the Houthis to strengthen its strategic and political leverage, while the Houthis exploited the escalation to secure political, economic, and military gains that reinforce their internal control. Tensions in the Red Sea and the Bab al-Mandab Strait are therefore likely to remain a pressure point serving the shared interests of Iran and the Houthis unless the international community and the influential powers within it adopt a firm stance toward conduct that threatens regional security and stability.

Israel's Place in the Conflict After the Collapse of the US-Iran Ceasefire

The failure of the memorandum of understanding between the United States and Iran played into Israel's hands, as Israel had opposed the agreement and considered itself uninvolved in it. The renewed military confrontation between the two sides therefore revived the Israeli government's hopes for an escalation of the war and for achieving its primary objectives, which had eluded it during the February round of talks. Israel exerted considerable effort in this regard, raising the issue of the Pickaxe Mountain nuclear site, which President Donald Trump had threatened to target, as well as Prime Minister Benjamin Netanyahu's visit to the United States at the end of July.

The Iranian issue featured prominently during Netanyahu's visit despite the controversy surrounding it, particularly as it coincided with efforts by mediators to revive the memorandum of understanding.

Israeli Gains from the Ceasefire Collapse

Both the United States and Iran attributed the failure of the memorandum of understanding to their dispute over the Strait of Hormuz. Tehran insisted that the strait be reopened on its own terms, while Washington demanded the restoration of freedom of navigation. Israel, however, was also a factor in the conflict. Iranian Parliament Speaker Mohammad Bagher Ghalibaf cited several US violations of the memorandum of understanding, including "the continued aggression of the Zionist regime against Lebanon."⁽²⁹⁾

Militarily, Israel did not participate in the renewed fighting following the collapse of the ceasefire, despite repeated statements by Israeli officials that they were prepared to participate if requested by the United States or in the event of attacks. This was due to Washington's refusal to allow Israeli involvement, as the Trump administration did not want a return to full-scale war. Nevertheless, this does not diminish Israel's deep and active involvement in intelligence sharing, consultations, and operational planning with the United States. This arrangement suits Tel Aviv, as the US Air Force is operating with high

efficiency without requiring the deployment of Israeli military resources. As an Israeli source put it, “The economy continues to operate as usual; there are no launches, no downings, no wasted interceptor missiles — and Iran is taking a major hit.”⁽³⁰⁾

Iran, for its part, appears content with this equation. Its responses have focused on targeting the Gulf states and Jordan without striking Israel, despite the Islamic Revolutionary Guard Corps’ (IRGC) awareness of the presence of American fighter jets and refueling aircraft at Israeli airfields. This suggests that Iran is approaching the situation with considerable pragmatism, seeking to raise the cost of the war without risking a devastating campaign, while preserving the option of striking Israel as a bargaining chip in the event of a full-scale escalation.

Israel sought to further escalate the confrontation by reviving the Iranian nuclear issue. It informed the United States that Iran had transferred thousands of uranium-enrichment centrifuges to deep underground facilities inside Pickaxe Mountain following the 12-Day War in June 2025. This is the same site that Trump identified on July 13 as a potential target for a major strike, marking his first direct public reference to it as a military target.⁽³¹⁾

Numerous voices subsequently called on Trump to target the site, arguing that preventing Iran from accessing this “nuclear sanctuary”

would represent a long-term strategic gain that future US presidents could preserve. They argued that this latest Iranian violation once again demonstrated that force is the only language the regime understands and that Trump clearly recognizes the threat. They also called on Congress and US military leaders to fully support him in disabling the site and permanently burying Iran’s nuclear ambitions.⁽³²⁾

Iran Remained a Central Issue During Netanyahu’s Visit to Washington

After a lengthy delay, the Israeli prime minister was finally able to visit the United States and meet with President Trump on the sidelines of the funeral of Republican Senator Lindsey Graham, one of Israel’s most prominent supporters in Congress. Iran remained a prominent backdrop to the visit, with arrangements for Netanyahu’s departure shrouded in secrecy amid security concerns over a potential Iranian attack. Many media reports suggest that the visit produced no significant results regarding Iran, which the Israeli prime minister placed at the forefront of his discussions with Trump. However, Netanyahu offered Trump no concessions, as contentious issues surrounding Iran remained unresolved, including Israel’s continued military escalation instead of negotiations and its refusal to withdraw from various territories, including Lebanon.

Tehran followed the visit with considerable apprehension, as such visits have become associated in the Iranian

view with war and escalation or with efforts to obstruct ongoing negotiations. From Tehran's perspective, whenever the Israeli prime minister sees the possibility of negotiations between Iran and the United States and the prospect of an agreement, he travels to Washington with the intention of undermining them. The Iranians believe that certain individuals and factions in the United States are receptive to Israeli pressure and therefore argue that the possibility must always be considered that Israeli demonization could play a role in rendering any agreements ineffective.⁽³³⁾

Former Iranian Foreign Minister Mohammad Javad Zarif conveyed a similar message in an article recounting the historical record of successive Israeli governments repeatedly viewing the ongoing confrontation between the United States and Iran as a preferred strategic option. He also highlighted Israeli media activity in Persian aimed at deepening internal polarization and weakening political support for negotiations. Zarif emphasized the need to recognize and counter what he described as the systematic manipulation of intelligence, media, and domestic politics on both sides of the conflict if future diplomatic initiatives are to avoid the fate of many previous efforts.⁽³⁴⁾

Iranians cite, in support of this argument, US Vice President JD Vance

who in mid-July criticized some Israeli ministers who wanted the war to continue indefinitely as well as their efforts to influence US public opinion in order to derail negotiations with Iran and keep the military campaign going "indefinitely."⁽³⁵⁾

Conclusion

The US termination of the memorandum of understanding and Iran's suspension of it coincided with Israel's position, which had rejected the agreement from the outset and sought to thwart it whenever an opportunity arose. Although Israel was a major party at the beginning of the war in February 2026, it did not participate in the renewed military confrontation, allowing it to secure its most important gains with minimal losses. Nevertheless, Israel worked to expand the war further by raising the nuclear issue.

However, the outcome of the meeting between the Israeli prime minister and the U.S. president reflected a degree of divergence between the two sides, with Trump appearing to favor negotiations and an agreement over the option of war that Netanyahu has advocated. Although the Strait of Hormuz has emerged as the most prominent point of contention, other issues involving Israel, such as the Lebanese front, could prove no less dangerous if an agreement is reached.

Iran's Relations With International Powers and Future Prospects

At the international level, the memorandum of understanding signed between the United States and Iran on June 18, 2026, collapsed amid fundamental disagreements over several of its provisions. Military confrontations between the two sides subsequently resumed before regional powers pressured them to return to the diplomatic track.

The US and Iran: Military Confrontation Resumes and the Prospects of Reverting to Diplomacy

The military confrontation between the United States and Iran has resumed after Washington concluded that Tehran had turned the Strait of Hormuz into a bargaining chip in the final negotiations. The renewed confrontation came after both sides escalated their hostile actions in ways that contradicted the understandings set out in the memorandum of understanding signed on June 18, 2026.

Despite the return to confrontation, the escalation has remained within controlled and calculated limits, as neither side wants to enter a zero-sum war. This has created an opportunity for regional parties to intervene and revive the role of mediators in an effort to defuse the crisis and give diplomacy another chance. Against this backdrop, the key questions are how the two sides view the crisis and what prospects remain for war and peace.

Disagreements That Reignited the War

Iran sought to exploit the memorandum of understanding reached with Washington to impose control over freedom of navigation in the Strait of Hormuz. During the 60-day negotiation period, Tehran insisted on asserting its sovereignty over the shipping lanes through the strait, thereby gaining an influential bargaining

chip. Iran also tied the reopening of the strait to Washington's cancellation of statements that would allow Iran to export its oil, at a time when Tehran was in urgent need of oil revenues to address its deteriorating domestic economic situation. It further linked the opening of the strait to the release of Iran's frozen assets abroad, a matter covered under the memorandum's 10th clause.⁽³⁶⁾

Washington did not accept this reality and subsequently sought to open a shipping route through Omani territorial waters. This prompted Iran to threaten the movement of ships through the strait and then return to closing it. Trump subsequently announced his withdrawal from the commitment to the memorandum of understanding, undermining diplomacy. Instead, U.S. military operations resumed, and the parties returned to the situation that had prevailed before the memorandum of understanding.

The tit-for-tat attacks exposed the fragility of the interim agreement, which quickly collapsed and plunged the two sides into a broader confrontation. The United States launched attacks on Iranian infrastructure and vital facilities, including threatening to target the Pickaxe Mountain nuclear facility. Washington also tightened its blockade on Iran and threatened a ground operation and unprecedented strikes. Iran responded by attacking U.S. bases and vital installations in several countries across the region, declaring the Strait of Hormuz closed

to shipping and encouraging the Houthis to take similar action in the Bab al-Mandab. The rebel group and its affiliated militias were also encouraged to escalate the conflict and increase the cost of the war by launching attacks against Gulf states.

Challenges That Revived Diplomacy

The renewed military operations have produced no different outcome from the previous confrontation, pointing to a precarious stalemate in which neither side has the decisive means to bring the conflict to an end on its own terms. The United States fears a large-scale war amid dwindling weapons stockpiles and growing concerns over the sustainability of the military campaign. The Trump administration also faces concerns about rising domestic energy prices and a potential backlash in the mid-term elections, which could weaken its political standing. While Israel is pressing Washington, Trump is facing even greater pressure from his regional allies to de-escalate the conflict and give diplomacy another opportunity. Oman, Qatar and Pakistan are playing complementary roles in efforts to defuse the crisis.

On the other hand, Iran fears Trump's unpredictable behavior and the possibility that he could fulfill his threat to launch a large-scale military strike that would undermine the legitimacy and survival of the regime, particularly amid a turbulent internal situation. Tehran also faces the prospect of a continued military blockade

and efforts to impose a new reality in the Strait of Hormuz that could strip Iran of its sovereignty over the strait in the future. Moreover, the Gulf states appear to have abandoned their strategic patience and become more willing to engage in direct confrontation with Iran and its militias in response to the continued attacks threatening their security and stability.

This reality contributed to both sides accepting de-escalation, responding to the mediators, and giving diplomacy a new chance. However, the current negotiations differ in that they are taking place on separate tracks: Omani-Iranian negotiations are addressing freedom of navigation through the Strait of Hormuz, while Qatar is leading mediation efforts between the United States and Iran to end the war and return to negotiations. The two tracks are nevertheless complementary, as they are inseparable and neither side is absent from either. The Omani-Iranian negotiations on regulating navigation through the Strait of Hormuz address the core issue that triggered the renewed fighting, and Washington believes that they are making progress. Meanwhile, Qatari mediation is working to resolve differences between the United States and Iran and end the current confrontation, while Oman and Qatar are coordinating with Pakistan to help defuse the crisis.⁽³⁷⁾

Conclusion

Trump is using the threat of force against Iran to pressure it into mak-

ing concessions at the negotiating table. Iran, for its part, continues to disrupt shipping through the Strait of Hormuz, uses the Houthis to pressure maritime traffic in the Red Sea, and has even escalated its attacks by targeting natural gas facilities in Egypt in an effort to raise the cost of confrontation. This pressure may be interpreted as a tactic to gain leverage at the negotiating table, but any miscalculation could trigger a renewed confrontation at any time, particularly given that some powers, such as Israel, want the conflict to continue. Moreover, Trump's failure to resolve the conflict would be viewed as a defeat, potentially prompting him to reject any agreement he considers unfavorable, especially as his domestic and international opponents promote the notion that he has lost the battle.

Nevertheless, prospects for de-escalation remain, particularly after Oman and Iran successfully agreed on the coordinates of a transit route through the Strait of Hormuz. The success of Qatari mediation remains necessary to complete the de-escalation process by persuading both sides to honor their commitments under the memorandum of understanding. Reaching an agreement with Oman, however, does not guarantee the re-opening of the strait, as that would

require specific conditions related to the United States fulfilling its commitments on sanctions, the naval blockade, frozen assets and the cessation of attacks, as demanded by Iran.

The Omani-Iranian agreement could therefore break the current deadlock and bring Iran and the United States back to the memorandum of understanding that the two sides have moved beyond, after it proved to be the best available agreement and neither side showed a willingness to engage in a prolonged war of attrition or make substantial concessions, particularly as the military operations have failed to change the situation on the ground. Signs of this have emerged in Washington's statements about the possibility of lifting some sanctions on Iran, following Iran's expression of willingness to cooperate with Oman in opening a new route that would not be entirely under its control. This suggests that both sides are currently inclined toward de-escalation and prepared to make partial concessions to restore momentum to the diplomatic process. The remaining challenge, however, lies in accepting the new reality and meeting its requirements amid deep-seated hostility, a lack of trust and a conflict that has become a turning point in the regional and even international balance of power.

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