



IRAN CASE FILE

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EXECUTIVE SUMMARY

The Iran Case File (ICF) for August 2026 examines the country's most significant developments during the month. On the domestic front, it reviews key political, economic, military and social developments. In the context of Iran's relations with Arab countries, the monthly report examines Syria's efforts to dismantle the legacy of Iranian influence and reassert control over supply routes, alongside Damascus's broader regional repositioning and Iran's response to these moves. Regarding Iran's relations with Western countries, the ICF focuses on the Trump administration's Operation Economic Outcast, which seeks to cripple Iran's foreign trade and compel Tehran to accept US terms.

On the domestic political front, Iran's Parliament voted in an open session in August 2026 to approve the general principles of a bill titled "Countering the Influence of Foreign Intelligence Services, Governments, and Entities." The legislation was presented as a response to legal and security gaps exposed by a series of intelligence breaches and assassinations targeting senior military commanders and scientists.

The bill, however, faced strong opposition from the government of President Masoud Pezeshkian, as well as from numerous media outlets, activists, politicians, legal experts, journalists and civil society organizations. Critics raised several concerns, foremost among them the bill's reliance on vague and excessively broad language that could undermine citizens' rights. They also argued that existing counterterrorism legislation was sufficient to address the threats in question and that the proposed law would give security agencies

excessive discretion in interpreting and penalizing citizens' behavior.

Opponents further warned that the legislation could restrict press freedom and turn communications with foreign entities into potential security offenses. They also cautioned that it could harm Iran's academic sector by isolating universities and accelerating the country's "brain drain," particularly through severe restrictions on scientific and academic cooperation with other countries.

Economically, Iran's gasoline crisis underscores the contradiction of a major oil-producing country that is forced to import part of its fuel requirements. Rapid growth in consumption, an aging vehicle fleet, inefficient transportation systems and heavily subsidized fuel prices have pushed demand beyond domestic production, creating an estimated daily shortfall of 14 million liters. At the same time, sanctions and the war have limited Iran's ability to expand refining capacity and finance dollar-denominated fuel imports. The crisis is particularly sensitive because gasoline is not simply an economic commodity; it is closely tied to citizens' mobility, living standards and broader social and security stability, as demonstrated by the protests of 2007 and 2019. Against this pressure, the recent introduction of gasoline quotas and new pricing mechanisms represents an attempt to balance supply security and the need to reduce foreign-currency outflows with the imperative of avoiding a sudden and destabilizing price shock. Although the measure could modestly reduce the cost of fuel imports,

it does not address the underlying structural problems and cannot fully prevent inflationary pressures from spreading to the prices of goods and services.

On the military front, Iranian Supreme Leader Mojtaba Khamenei issued a series of appointment decrees on August 10, 2026, affecting six senior commanders in the upper echelons of the army, the Islamic Revolutionary Guard Corps (IRGC), and the Basij. The appointments formalized a wartime command structure that had effectively been operating for months without officially announced appointments following recent developments and the outbreak of war. The most notable aspect of the reshuffle was its generational character: almost all of those appointed are IRGC veterans from the 1980s whose careers span the Iran-Iraq War, overseas operations and domestic crackdowns. Meanwhile, the confrontation between Iran and the United States continued to escalate, with Washington resuming strikes on Iranian targets, including missile launchers on Larak Island, and destroying several oil tankers linked to the IRGC. Iran responded by launching ballistic missiles at US bases in Jordan.

On the social front, Iranian media and social affairs experts have highlighted a major demographic shift reflected in the sharp decline in marriage rates. Official statistics and social reports from 2026 indicate that approximately 18 million young Iranians have never married, pointing to a significant decline in young people's willingness or ability to enter relationships and establish

families. The trend is no longer confined to particular regions or social groups but has developed into a broader nationwide crisis. It is driven by a combination of economic pressures resulting from sanctions and the consequences of war, as well as what Iranian media and experts describe as the diversion of national resources toward expansionist projects abroad. If the trend continues, it could develop into a multifaceted demographic crisis with serious consequences for Iran's future. Reversing it will require broader socioeconomic reforms aimed at creating sustainable employment, expanding access to affordable housing and providing effective and sustainable support and incentives for young people.

Ideologically, Mojtaba Khamenei's August 30, 2026 message to Islamic nations reflects an Iranian effort to redefine the concept of "Islamic unity" within a political and security framework that extends beyond its traditional religious meaning. The letter goes beyond a general call for Muslim rapprochement by linking unity to collective defense, security, economic resources, scientific advancement and development, ultimately placing these goals within the broader project of building a "New Islamic Civilization." In doing so, it articulates an Iranian vision for an alternative regional order in the aftermath of the US-Iran war. The letter places the United States and Israel at the center of Iran's definition of the "enemy" while portraying Iran as a natural partner for Islamic countries, particularly the Gulf states, in confronting a common threat rather than as a source of regional instability.

At the same time, this rhetoric reveals elements of hegemony and political tutelage, as Tehran seeks to determine who should be regarded as a friend or adversary and to establish the boundaries within which Islamic countries should define their alliances. The contradiction becomes more apparent when this discourse is compared with Iran's domestic political practice. Within the framework of Wilayat al-Faqih (Guardianship of the Islamic Jurist), the concept of "unity" remains conditional on adherence to the principles of the Iranian revolution, the political order and the authority of the supreme leader, while public dissent is suppressed. Consequently, the viability of this vision beyond Iran will depend on whether Tehran can move away from a language of tutelage and hegemony toward genuine partnerships based on equality, respect for state sovereignty and recognition of the diversity of national interests and alliances. More fundamentally, its credibility will depend on whether Iran itself undergoes a strategic transformation capable of bringing its public rhetoric into greater alignment with its internal political practices.

Iran's relations with the Arab world also witnessed significant developments during the period under review. In the case of Iran-Syria relations, developments in August 2026 indicated a notable change in the Syrian government's approach to Iranian influence. Damascus appears to have moved beyond merely containing the consequences of that influence toward dismantling its operational mechanisms, particularly arms-smuggling networks extending

across Iraq, Syria and Lebanon. This shift coincided with Syria's participation in Arab and international security arrangements aimed at strengthening border controls and information-sharing capabilities, further reinforcing Damascus's regional repositioning away from the Iranian axis.

At the international level, the United States and Iran remain locked

in an increasingly zero-sum confrontation, with diplomatic channels largely sidelined. Both sides continue to rely on strategies centered on force and confrontation in an effort to compel the other to capitulate. As a result, the coming period is likely to bring further rounds of economic and military escalation.

DEVELOPMENTS IN IRAN'S INTERNAL AFFAIRS

During August 2026, Iran witnessed a wide range of political, economic, military, social and ideological developments, including:

- Iran's chronic gasoline crisis
- Controversy and criticism over the bill to counter foreign influence
- Iran prepares for a prolonged war of attrition
- Declining marriage rates amid war and economic crisis
- The significations of Mojtaba Khamenei's message to Muslim countries

Iran's Deepening Fuel Deficit: Makeshift Solutions for a Chronic Crisis

The August 2026 ICF examines one of Iran's most sensitive economic challenges: the gasoline shortage and the government's efforts to contain the crisis amid the ongoing war and worsening economic conditions.

Root Causes of the Crisis

The causes of Iran's gasoline crisis are multifaceted, reflecting a combination of supply-demand imbalances involving both fuel and foreign currency, as well as longstanding structural problems such as an aging vehicle fleet, high consumption levels and successive rounds of sanctions. These pressures have been compounded by the current wartime environment, including damage to infrastructure and external blockades, further deepening the crisis and contributing to its recurrence every few years.

A pronounced gap has emerged between gasoline supply and demand. Iran consumes approximately 135 million liters of gasoline per day while producing about 121 million liters, leaving a daily shortfall of roughly 14 million liters.⁽¹⁾ This deficit was previously covered through imports, but those supplies have been disrupted by the US naval blockade and the UAE's suspension of trade and financial relations with Iran. The UAE had previously served as a major transit hub for gasoline shipments bound for Iran.

Growing domestic demand has further intensified the problem. Gasoline remains heavily subsidized,

and its price has fallen significantly in real terms as inflation has eroded its purchasing value. This has encouraged higher consumption and increased fuel smuggling across Iran's land borders into neighboring countries, particularly Pakistan and Afghanistan. The country's aging vehicle fleet, spanning both public and private transportation, has also contributed to rising fuel consumption. These pressures are compounded by inefficient fuel-saving technologies and Iran's limited access to modern technological solutions, largely as a result of long-running economic sanctions.

The war has increased pressure by generating economic disruptions that have directly aggravated the gasoline crisis. Fuel storage and refining facilities in various parts of the country have been damaged or destroyed, while southern ports have suffered damage and operational disruptions. At the same time, the conflict triggered a sharp depreciation of the Iranian currency, with the dollar reaching approximately 220,000 tomans by the end of August, a 28% increase from June. The resulting rise in the cost of foreign currency has made gasoline imports substantially more expensive. This has occurred as Iran's budget is already facing a widening deficit and declining sources of revenue, most notably oil, which accounts for approximately 50%-60% of the country's foreign-currency earnings.

The Government's Response to the Crisis

Gasoline shortages have long been a structural problem in Iran, prompt-

ing successive governments to resort to repeated price increases, some of which have triggered widespread public protests. To avoid another major price shock, the current government has pursued alternative measures to manage the crisis. By the end of 2025, it introduced a consumption-based quota system with three pricing tiers: the first 60 liters per vehicle⁽²⁾ per month at 1,500 tomans per liter; the second 100 liters at 3,000 tomans per liter; and any additional consumption above 160 liters per month at 5,000 tomans per liter.

Following the outbreak of war in February 2026, the resulting economic and financial disruptions and growing foreign-currency shortages forced the Iranian government to prioritize its hard-currency expenditures. Tehran faced a difficult choice between securing essential imports, including food, medicine and industrial raw materials, and continuing to subsidize gasoline imports despite rising domestic consumption and fuel smuggling.

In response, Iran's Parliament Planning and Budget Committee developed several scenarios over the following two months for managing the shortage. One option was to distribute the available domestic production of 121 million liters per day at the existing price and shut down fuel pumps once the supply was exhausted. Another was to maintain subsidized quotas while charging a significantly higher market-based price for consumption beyond those quotas, potentially more than 10 times the subsidized rate.

The debate was ultimately settled after the government finalized its plan for addressing the gasoline shortage. In early September 2026,⁽³⁾ a government spokesperson announced the details of the new pricing structure. Under the revised system, only the third tier would become more expensive, while the price of the first two tiers would remain unchanged:

1. First tier: The monthly quota of 60 liters will remain priced at 1,500 tomans per liter.

2. Second tier: A monthly quota of 50 liters will be sold at 3,000 tomans per liter. The quota has been reduced by half from the previous 100 liters, while the price remains unchanged.

3. Third tier: Consumption exceeding the new combined quota of 110 liters per month will be priced at 10,000 tomans per liter, effective from the morning of September 8, 2026. This represents a doubling of the previous third-tier price, from 5,000 to 10,000 tomans per liter.

Fuel Policy Outcomes

In its latest move, the Iranian government sought to strike a delicate balance between reducing the financial burden on the state and maximizing, with great caution, the impact on Iranian households, which have already been grappling with severe inflation and worsening living conditions since the outbreak of the war in late February 2026. However, the measure is not without economic consequences for either the government or the public, as outlined below.

At the government level, the policy is expected to generate limited

foreign-currency savings for the state budget, estimated at approximately \$1.1 billion annually if the third-tier price of 10,000 toman per liter is implemented. One of the government's main objectives is to reduce gasoline consumption by approximately 2 million liters per month and redirect that demand toward compressed natural gas (CNG) as a vehicle fuel, according to a preliminary study by the Plan and Budget Organization.⁽⁴⁾

Even if the new policy succeeds in reducing the gasoline deficit by 2 million liters per month, a substantial shortfall of approximately 12 million liters would remain. The measure therefore addresses only part of the underlying problem. The government has refrained from adopting a more drastic solution out of concern that it could trigger a social shock and widespread public anger, as occurred in 2007 under Mahmoud Ahmadinejad and again in November 2019 under Hassan Rouhani. The new policy is consequently best understood as an interim measure, with the risk of another gasoline crisis emerging in the near term remaining high, particularly if the war and the economic blockade imposed on Iran continue.

At the consumer level, the direct financial burden will fall primarily on those whose monthly gasoline consumption exceeds 110 liters. This is a relatively modest threshold, equivalent to little more than three full tanks for many small vehicles at the subsidized rate. Because a large proportion of Iran's vehicle fleet consists of older and relatively fuel-inefficient models, people who

need to consume more than the subsidized quota will face significantly higher costs. This is despite government assurances that the existing allocations are sufficient to meet the fuel needs of up to 85% of Iranian consumers.

Whether the policy ultimately succeeds in reducing domestic gasoline consumption or instead shifts the financial burden onto consumers who exceed their quotas, its broader economic effects could include weaker household consumption and reduced demand across the economy, potentially weighing on GDP growth. Higher gasoline prices could also feed into transportation costs, service charges and the prices of goods, even though diesel prices remain unchanged.

Another potential consequence is expectations-driven inflation, whereby pessimistic expectations about future prices contribute to current inflation independently of immediate supply-and-demand conditions. This mechanism could impose additional costs on consumers who are already facing severe inflation, which reached a record year-on-year rate of 70% in August, while the dollar exchange rate surpassed 220,000 toman for the first time.

Thus, although the government has sought to avoid a sudden and politically destabilizing increase in gasoline prices, the country's deteriorating living conditions could make the public particularly sensitive to any measure that raises the cost of living. The impact could be contained if the government moves quickly to address the policy's secondary effects, including

by introducing technologies that improve vehicle fuel efficiency and accelerating the conversion of vehicles from gasoline to natural gas, alongside other measures aimed at reducing fuel consumption and easing pressure on households.

Conclusion

The Iranian government's recent decision to address the gasoline crisis is not a new approach but another episode in a cycle of fuel-price increases that has recurred over the past two decades. The pattern is familiar: a deepening supply crisis is followed by higher prices, which can in turn trigger public protests when increases exceed what society can absorb. The latest measure therefore appears to be a temporary response driven largely by concerns about the potential social and security consequences of more sweeping reforms, rather than a comprehensive solution to the underlying crisis.

Although the policy could generate limited foreign-currency savings for the state and encourage greater use of CNG in vehicles in the short term, it cannot by itself eliminate a daily gasoline deficit of nearly 14 million liters. Nor does it address the structural drivers of the crisis, including Iran's dependence on an aging and inefficient vehicle fleet, cross-border fuel smuggling and insufficient investment in refining capacity. Moreover, the policy is likely to generate additional price pressures that could further increase the inflationary burden on Iranian households.

Iranian Bill on Countering Foreign Influence Sparks Criticism and Controversy

During a public session on Sunday, August 17, 2026, the Iranian Parliament approved the general principles of a bill designed to curb the influence of foreign intelligence agencies, governments and institutions inside Iran. The measure secured 183 votes from the 258 lawmakers present. Its drafters and supporters say the legislation is intended to address legal and security loopholes exposed by a series of intelligence breaches and assassinations targeting senior officials and scientists. The bill, however, has met with opposition from the government, media outlets, activists, politicians, legal experts, journalists and civil society organizations. This file presents an overview of the bill's main provisions and implications as well as the rationales of its supporters and detractors.

Key Provisions of the Bill and Its Significations

The "Countering the Influence of Foreign Intelligence Services, Governments, and Entities" bill establishes a new legal framework intended to protect Iran's independence, sovereignty, national security and Islamic-Iranian cultural identity. Through its 33 provisions, the bill criminalizes certain forms of communication with foreign media outlets that Iran considers hostile if they have not obtained prior approval from the competent authorities. The bill also requires the Ministry of Intelligence to publish an annual list of countries, institutions and universities autho-

rized for cooperation, while restricting collaboration with entities outside that list. In addition, it prohibits political parties, associations and non-governmental organizations from accepting funds or assistance from foreign intelligence agencies, governments or non-Iranian entities for use in general, labor union or professional elections. Violations could result in imprisonment, confiscation of acquired assets and a fine equal to twice the value of the assets received. The bill also criminalizes providing information or data to foreign parties without the express consent of the Iranian Ministry of Intelligence. Economically, it emphasizes monitoring and prosecuting economic crimes involving foreign parties, with penalties of up to 30 years in prison, while assigning the Revolutionary Courts jurisdiction over all such cases.⁽⁵⁾

According to the published draft law, any contact by individuals or private or public entities with embassies, offices or organizations affiliated with non-Iranian entities, whether inside Iran or abroad, would require either notification to the Ministry of Foreign Affairs, or to an Iranian embassy or consulate overseas, or prior written authorization from those authorities. The bill's criminal provisions would apply not only to Iranian citizens but also to foreign nationals residing in Iran, who would be subject to the same legal measures. Foreign nationals found in violation could face deportation and a fine of up to €10,000. In addition, cultural activities undertaken by individuals who entered Iran legally but are deemed inconsistent with national security

or state policies would be subject to the same penalties.⁽⁶⁾

Arguments for and Against the Bill

Opinion remains sharply divided, with lawmakers objecting to some of the bill's provisions and calling for amendments during parliamentary deliberations. Supporters argue that the war Iran has endured, the assassinations of numerous Iranian leaders and the extensive damage to infrastructure have underscored the need to make the reporting of suspicious activities mandatory, strengthen coordination among intelligence agencies and impose tougher penalties. They maintain that existing laws have proved inadequate to prevent the serious security breaches Iran has experienced in recent years and regard the proposed measures as a strategic necessity for identifying and preventing foreign and domestic espionage networks from carrying out further infiltration and destabilizing activities inside the country. Supporters also stress the importance of adopting a systematic approach to confronting modern espionage methods. Hassan Ghashghavi, spokesperson for Parliament's National Security and Foreign Policy Committee, says that although Iranian law clearly defines traditional espionage, significant legal gaps remain regarding "soft," intellectual and structural espionage, which he argues must be addressed through new legislation.⁽⁷⁾ Similarly, lawmaker Alireza Salimi, who supports the bill, considers new regulations to counter threats and information warfare a strategic necessity.⁽⁸⁾

In contrast, the bill's provisions have come under strong criticism from the Pezeshkian administration, media outlets, political activists, legal experts and social and cultural institutions. The main objections raised by these groups are outlined below.

1. At the government level, Majid Ansari, legal deputy to Iranian President Masoud Pezeshkian, announced the government's opposition to the current draft. He warned of the risks posed by broad and open-ended language in criminal legislation, stressing that criminalizing conduct on the basis of vague terms could violate citizens' rights and undermine legal stability in society.⁽⁹⁾

2. Contrary to supporters' claims that existing laws are inadequate to prevent the serious security breaches Iran has experienced, Iranian legal experts argue that the country's current criminal legislation is sufficient to address espionage, cooperation with hostile governments and threats to national security. They contend that introducing parallel legislation containing broad and ambiguous definitions would give law enforcement agencies greater discretion to interpret ordinary citizens' conduct as security-related offenses, thereby increasing legal uncertainty and insecurity throughout society.⁽¹⁰⁾

3. The bill turns ordinary external communications into matters of national security and criminal law. Its scope goes beyond espionage and the transfer of classified information to cover interactions with foreign media outlets, universities, institutions and individuals. The draft imposes restrictions, and in some cases

criminal penalties, on such activities, potentially subjecting many Iranians to unjust sanctions.

4. The bill could harm universities and international scientific cooperation while accelerating the brain drain by making scientific, professional and research collaboration with foreign countries increasingly risky. The government has explicitly warned against closing channels of scientific exchange with universities and research centers around the world, pointing to the serious consequences this could have for Iran's academic community and the potential for further accelerating the departure of elites, researchers and professors.⁽¹¹⁾

5. Others have also raised concerns about restrictions on media freedom, particularly the lack of a clear distinction between cooperation with foreign entities and legitimate professional engagement with foreign media outlets.

It is important to note that most critics of the draft law, including the government, do not object to the principle of combating espionage. Rather, they argue that the current text is vague and overly broad and are seeking to persuade the parliamentary leadership to return the bill to the National Security Committee for structural revisions. Hesamodin Ashena, a former adviser to President Hassan Rouhani, for example, acknowledged that combating espionage, foreign funding of elections, the transfer of classified information and foreign-directed operations are legitimate objectives for protecting the country's independence and security. However, he criticized the way the bill defines and delineates these

offenses. His main concerns include the use of criminal concepts that are excessively broad and ambiguous; the criminalization of ordinary academic, media, cultural and diplomatic activities without requiring proof of criminal intent; the imposition of liability in some cases for the actions of others, including acts committed without an individual's knowledge or intent; and penalties that he considers disproportionate to the alleged offenses, including permanent deprivation of rights and the confiscation of all assets.⁽¹²⁾

Conclusion

“Hardliners” are seeking to capitalize on Iran's favorable political and security environment, particularly following a series of assassinations and rising tensions with the United States and Israel, to advance legislation aimed at countering the influence of foreign intelligence agencies, governments and entities. However, given the widespread backlash, a final parliamentary vote without addressing the government's concerns could deepen divisions between the executive and legislative branches. Such a development would not necessarily result in an open confrontation but could instead lead to an institutional dispute over the law's scope and implementation. If public opposition to the bill grows alongside continued government resistance, Parliament could be encouraged to revise some of its most controversial provisions, potentially clearing the way for the bill's completion and eventual enactment into law.

Iran Braces for a Prolonged War of Attrition

By August 2026, war fatigue had given way to widespread disillusionment. Uncompromising positions on both sides prevented them from finding meaningful common ground after Iran imposed new conditions for reopening the Strait of Hormuz, while Washington announced an economic blockade. Meanwhile, Iran and the United States carried out sporadic attacks against oil tankers and military installations, effectively holding the region and vital maritime trade hostage. The escalation unfolded amid a major restructuring of Iran's security and military leadership following the death of Supreme Leader Ali Khamenei in February. This file examines two central developments: the restructuring of Iran's senior military leadership and the sporadic, reciprocal attacks between Iran and the United States.

Reshuffling the Military Leadership's Top Brass

Six months into the war, Supreme Leader Mojtaba Khamenei managed to consolidate the upper echelons of Iran's military and security establishment. On August 10, he appointed six commanders to some of the country's most critical military positions, including the General Staff of the Armed Forces, the leadership of the Islamic Revolutionary Guard Corps (IRGC), the IRGC Navy and the Basij.⁽¹³⁾ In addition, on August 9, veteran IRGC figures Mohsen Rezaei and Mohammad Bagher Zolghadr were reappointed to key positions within

the security establishment and the Office of the Supreme Leader.

The most notable feature of these appointments is the restoration of an older generation of leadership. Nearly all the appointees are IRGC veterans from the 1980s whose careers span the Iran-Iraq War, overseas operations and domestic crackdowns. Brigadier General Kioumars Heydari, the new deputy chief of staff, is the only officer from the regular army in a lineup otherwise dominated by the IRGC. Notably, both Rezaei and the new IRGC Commander-in-Chief Ahmad Vahidi are the subjects of Interpol Red Notices in connection with the 1994 bombing of the Argentine Jewish community center in Buenos Aires.

Each appointment carries both symbolic and operational significance. Rezaei, who commanded the IRGC from 1981 to 1997 and is a “hard-liner” who has openly discussed the possibility of detaining US soldiers, now serves as secretary of the Supreme National Security Council.⁽¹⁴⁾ The sequence of his appointments is also significant: Mojtaba Khamenei first gave him a voting seat before President Masoud Pezeshkian appointed him secretary, signaling the president’s submission to the authority of the supreme leader who had not appeared in public for months.

Meanwhile, Vahidi, the former commander of the Quds Force, now heads the IRGC, with Mostafa Izadi, a veteran of cyber and hybrid warfare, serving as his deputy. Ali Azmaei has formally taken command of the IRGC Navy following the wartime death of Alireza Tangsiri. Most significantly, however, Hossein Taeb,

who was removed as head of IRGC intelligence in 2022, has returned to lead the Basij, a force he previously commanded during the crackdown on the 2009 protests. Taeb has been explicitly tasked with establishing a “grassroots intelligence network” and expanding surveillance of society amid expectations of widespread protests.

Two structural changes point to an ideological shift. First, the promotion of Ali Abdollahi to head the General Staff coincided with the integration of the Khatam al-Anbiya Central Headquarters into the General Staff, effectively merging wartime emergency command with the armed forces’ routine development and operational functions. Second, the simultaneous promotion of two “hard-liner” figures has strengthened the military-security faction at the highest levels of power while marginalizing the more conciliatory bloc represented by President Pezeshkian and Foreign Minister Abbas Araghchi. Nevertheless, Parliament Speaker Mohammad Bagher Ghalibaf retains considerable influence, as Abdollahi served as his deputy for many years while Ghalibaf was commander of the national security forces.

The Supreme National Security Council has also evolved from a body that primarily rubber-stamped decisions into an arena of internal competition. Rezaei and Saeed Jalili now constitute a core representing the supreme leader, reinforced by Vahidi’s presence as a constitutional member, while the supreme leader himself remains largely absent. As a result, decisions are increasingly shaped through internal bargaining rather

than issued as direct orders, setting the stage for tensions between Rezaei and Ghalibaf. Both regard themselves as candidates for higher office and have previously competed against each other in presidential elections. This restructuring represents less a new radicalization than a hardening of positions that already existed: an “old guard” adapting under pressure, openly asserting its defiance rather than concealing it, and preparing for a prolonged war of attrition.

Intermittent Trading of Attacks

The second half of August revealed a growing sense of desperation on both sides, with the United States and Iran seeking to alter the existing status quo. In late August 2026, the United States resumed strikes against Iranian targets after detecting preparations to lay mines in shipping lanes. US forces targeted missile launchers on Larak Island and later destroyed several oil tankers linked to the IRGC after attempts were made to launch missiles at US vessels.⁽¹⁵⁾ Iran retaliated by firing ballistic missiles at US bases in Jordan, although air defenses intercepted most of them, preventing significant casualties.

An analysis of US-Iranian military activity in the region points to three operational tracks. First, the IRGC carried out retaliatory missile and drone strikes against US military infrastructure in the region, specifically the King Hussein and Azraq air bases in Jordan, the Ali Al-Salem base in Kuwait, including an MQ-9 hangar, and radar and air-defense systems in Bahrain including a Patriot battery.⁽¹⁶⁾ The IRGC described these attacks as an effort to undermine US

capabilities in the Gulf. Second, the IRGC continued to assert control over navigation in the Strait of Hormuz, claiming to have disrupted several tankers using “unauthorized” routes south of the strait. One such incident involved a supertanker catching fire after encountering mines. The IRGC also implicitly warned that oil, gas and even fertilizer shipments would not pass safely unless the United States accepted its terms and backed down. Third, the IRGC claimed to have shot down several US drones, including MQ-9s, over the strait.

Conclusion

Iran’s ability to withstand US strikes and sanctions will depend in part on the outcome of the upcoming US midterm elections, as Washington appears increasingly determined to defeat Iran through intensified sanctions and a military blockade. Such measures would restrict Iran’s oil production to domestic consumption and severely undermine the establishment’s ability to finance allied militias, obtain essential spare parts for drones and radar systems and secure the components required to produce fuel for its remaining missiles. Despite logistical challenges and domestic political pressure, the United States continues to monitor and destroy Iranian military facilities, including sites that have either been repaired or previously gone undetected. For now, diplomacy remains in the background.

Declining Marriage Rates in Iran: Between War and Economic Crisis

Iranian media have recently drawn attention to a major social transfor-

mation that could develop into a multifaceted demographic crisis with serious implications for the country's future. The crisis is reflected in declining marriage rates, a growing number of unmarried people, falling birth rates and the accelerating aging of the population. These trends are not merely temporary changes in individual preferences; they point to deeper economic, social and cultural transformations that are reshaping Iran's demographic structure and changing patterns of family formation. They also have broader implications for economic growth, while leaving citizens increasingly uncertain amid overlapping economic, social and political crises, particularly the pressures created by war. This situation underscores the need for urgent government action to prevent these demographic trends from becoming deeply entrenched. This file examines the crisis from two main perspectives: the impact of the economic crisis and war on declining marriage rates and the Iranian government's response to this trend.

Economic Crisis and War

The growing reluctance to marry in Iran has become closely tied to the prolonged deterioration of economic and living conditions. For large segments of the younger generation, marriage is no longer viewed as a natural stage of life but as an expensive and high-risk commitment that is increasingly beyond their means. International sanctions, the effects of war and blockades and annual inflation of approximately 69.9%⁽¹⁷⁾ have rapidly widened the gap between incomes and the cost of living. These

pressures are compounded by the continued depreciation of the currency, sharply rising property prices averaging 240 million tomans per square meter, rent increases of between 79% and 100%,⁽¹⁸⁾ widespread job insecurity and an unemployment rate of around 9.1%.⁽¹⁹⁾ Together, these conditions have made establishing a household a financial burden that many young people cannot afford. As a result, increasing numbers are postponing marriage or choosing not to marry at all — a pragmatic response to economic hardship rather than necessarily a rejection of marriage or the family as an institution.

Available data point to a steadily expanding population of unmarried people in Iran. The deputy minister of youth and sports has stated that the number of people who have never married has reached 18 million.⁽²⁰⁾ Marzieh Vahid-Dastjerdi, secretary of the National Population Headquarters, likewise reported that “according to final statistics, there are 7.35 million unmarried men aged 20 to 54 and 6.92 million unmarried women aged 15 to 49 in the country, with the average age of marriage standing at 24 for women and 28 for men.”⁽²¹⁾ These figures indicate a growing demographic imbalance that goes beyond the simple postponement of marriage. They point to the rising trend of the indefinite deferment of marriage across larger segments of the population, particularly as economic uncertainty and limited prospects make it increasingly difficult for young people to plan for a stable family future.

The crisis extends beyond economic hardship and is also shaped by

broader cultural and social changes. These include evolving lifestyles, rising expectations between prospective spouses, growing individualism, women's increasing participation in higher education and the workforce, concerns about marital failure and the constraints associated with family life and the pursuit of higher education. Yet these factors cannot be separated from the economic environment; they interact with and reinforce one another. As uncertainty about the future grows and confidence in financial and political stability declines, young people are increasingly inclined to take a cautious approach and postpone major life decisions, including marriage.

War should be understood as a multiplier of the crisis rather than its primary cause. It has intensified feelings of insecurity and expanded the range of risks associated with displacement, migration, declining incomes, rising prices and the growing difficulty of making long-term plans. As a result, many young people are prioritizing survival and meeting their immediate needs over starting a family, which requires a degree of stability and confidence in the future. In this sense, the war has further weakened an already strained socio-economic structure and deepened the vulnerability of Iranian society.

These developments are also having a direct impact on fertility and the country's age structure. The secretary of the National Population Headquarters reported that the

number of births projected for 2025 had fallen by 8.9% compared with 2024.⁽²²⁾ At the same time, the older population is expected to increase significantly in the coming decades. According to UN estimates, Iran ranks fifth in the Middle East in terms of population aging, with people aged 65 and older accounting for approximately 9% of the total population.⁽²³⁾ If declining marriage and birth rates persist, Iran is likely to face serious long-term consequences, including a shrinking workforce, growing pressure on pension, healthcare, rehabilitation and social security systems, and weaker prospects for economic growth as the productive base narrows and the population ages.

The Government's Response

The Iranian government has responded to the crisis with a range of policies designed to encourage marriage and childbearing, alongside social and housing support programs and fertility incentives. Among the most prominent measures were marriage loans totaling 350 trillion tomans,⁽²⁴⁾ with approximately 700,000 applicants reportedly waiting to receive them. However, the program failed to achieve its intended objectives because of banking delays, long queues and a growing backlog of applications that prevented the loans from being disbursed in a timely manner. The real value of the loans has also declined sharply because of inflation and the rising cost of marriage, while increasing their value has been dif-

ficult given Iran's limited financial resources under wartime conditions.

To address the impasse, Najib Hosseini, a member of the Iranian Parliament's Budget Committee, proposed an alternative arrangement under which 30% of the loan would be provided in cash and the remaining 70% in the form of goods and services.⁽²⁵⁾ The government also attempted to reduce housing and rental costs,⁽²⁶⁾ which represent a major obstacle to marriage, by introducing a rent-cap law. However, the measure encountered numerous implementation challenges and ultimately failed to produce the desired results.

In response, the secretary of the National Population Headquarters stressed the need to involve donors and civil society activists, strengthen social networks and expand and improve the implementation of programs supporting marriage and family formation. She also called for innovative approaches based on successful domestic and international models and practical solutions, while emphasizing the need to assess existing support policies carefully and direct resources toward initiatives capable of producing measurable progress toward demographic objectives.

Other proposed measures include tackling unemployment and creating sustainable employment opportunities; offering tax incentives to businesses that hire young people; providing flexible work arrangements for young women to reduce tensions between family and professional responsibilities; making greater use of cultural and media resources and the digital sphere; developing content

and role models that strengthen young people's individual, family, and social identities; and strengthening academic counseling centers while expanding premarital and marital counseling services, which are considered important to sustaining marriages.⁽²⁷⁾ Parliament has also placed the issue of high dowry costs on its agenda for consideration.⁽²⁸⁾

There is growing recognition that policies focused solely on encouraging young people to marry or providing limited financial support cannot resolve the crisis. Addressing it effectively requires a comprehensive and sustained package of measures, including the creation of stable, long-term employment opportunities rather than dependence on temporary loans; increasing incomes in line with inflation; expanding access to affordable housing for young people; improving and monitoring banking services; strengthening counseling centers; promoting a social culture that makes marriage more accessible; and addressing excessive dowries and the escalating costs of weddings.

Support should also be targeted toward the groups most vulnerable to economic and social pressures, particularly low-income people and those without adequate housing, rather than being concentrated on broad policies with limited practical impact. Finally, the government needs to establish effective mechanisms for monitoring and measuring the outcomes of population policies to ensure that these programs produce tangible results rather than remaining largely promotional initiatives or short-term responses to an

increasingly structural demographic crisis.

The effectiveness of any policy should not be judged by the number or value of loans announced, but by its ability to reduce the gap between marriage and childbirth, restore young people's confidence in their future, and improve the quality of public services. Without greater transparency and flexibility in addressing socioeconomic challenges, mounting frustration could develop into broader social discontent, deepening the crisis of trust between the state and society and potentially intensifying protests across Iran.

Conclusion

These pressures are likely to further discourage marriage and trigger demographic changes that could profoundly reshape Iran's population structure and family patterns. Unless the state moves away from fragmented, short-term measures toward comprehensive planning, these developments could become a long-term strategic challenge requiring fundamental solutions at both the domestic and international levels. Externally, Iran needs to improve relations with neighboring countries and avoid policies that threaten national security or accelerate the erosion of social capital. Such a shift could also generate domestic benefits by helping improve economic conditions through the easing of sanctions and the reduction of Iran's international isolation. Domestically, however, progress will depend on the government developing sustainable and practical policies and delivering high-quality public services across sectors. This

must be accompanied by efforts to bring living standards more closely in line with incomes and inflation, create sustainable employment, address the housing crisis and allocate adequate state resources to create conditions conducive to marriage and the formation of stable, healthy families capable of contributing to Iran's long-term development.

Mojtaba Khamenei's Message to Muslim Countries

On August 30, 2026, Iranian Supreme Leader Mojtaba Khamenei issued a message marking "Islamic Unity Week," a statement whose significance extends well beyond the immediate occasion. Rather than simply reiterating the traditional call for Islamic unity or invoking Palestine as a galvanizing issue, Mojtaba Khamenei presented a broader intellectual vision. It begins with unity, extends to shared defense and cooperation in wealth, security, science and development, and ultimately leads to what he described as the "New Islamic Civilization." The message can therefore be read as a concise expression of an Iranian vision for an alternative regional order in the aftermath of the US-Iran war. It draws on religious concepts, interpreted through the specific Iranian understanding of Wilayat al-Faqih (Supreme Guardianship of the Jurist), while simultaneously serving political, security and civilizational purposes. This file examines his vision in two sections: the first explores the substance and implications of Mojtaba Khamenei's message, while the second addresses the question of unity within Iran.

The Supreme Leader's Message and Its Significations

Mojtaba Khamenei presents unity as a “Quranic strategy,” placing it within the realm of political action, which he regards as inseparable from the religious sphere. A strategy, by definition, implies an adversary, an objective, a set of means and a hierarchy of priorities. In this context, he states, “The primary prerequisite for this vital matter is the unity of the Muslims. Muslim unity in the face of global disbelief is not a superficial or fleeting issue; rather, it is a Quranic strategy and a fundamental tenet of authentic Muhammadan Islam.”⁽²⁹⁾ His formulation divides the world into the camps of disbelief and faith, meaning that countries confronting Iran are portrayed not simply as political or military adversaries but as members of the “global disbelief” camp. Accordingly, he invokes the Quranic verse, “stern against the disbelievers, merciful among themselves,” as a framework for understanding relations between the Islamic world and its hostile external counterparts. He presents internal cohesion as a prerequisite for restoring “honor” and developing the capacity for effective action. His objective, therefore, appears not to be Muslim unity as an end in itself, but rather, first, to secure Muslim support for Iran in its confrontation with “global disbelief” and second, to bring Muslims under Iran’s banner by encouraging them to adopt its definitions of jihad, friend and foe.

Khamenei defines unity as placing the elements shared by Islamic societies at the center of their collective

framework and, through dialogue and within the bonds of brotherhood, seeking to turn areas of disagreement into areas of common ground. He states, “What is meant by unity is making the points shared by all — at the general level of Islamic societies — the axis and the foundation.”

The message does not restrict the sources of division to doctrinal or sectarian disputes. It also identifies ethnic, cultural, social, economic, political and geographic differences, portraying their use as instruments of conflict as part of the “enemy’s” strategy. At the same time, however, the message serves an unmistakably political purpose: by equating conflict, or even simple disagreement, among Muslims with serving the enemy, it creates a basis for monopolizing the truth and suppressing dialogue under the pretext of preventing discord. In effect, the supreme leader appears to seek to extend beyond Iran the approach he has pursued domestically, applying it to Muslims more broadly by suppressing dissent and portraying those who disagree as serving the enemy. This, in turn, empties the concept of unity of its substantive meaning, subordinating it to Iranian tutelage and promoting the supreme leader’s doctrine of Wilayat al-Faqih over Muslims, with himself positioned as the guardian of Islam and the Muslim community.

Another prominent aspect of Mojtaba Khamenei’s message is his attempt to define the enemy from his own perspective, with an explicit effort to redefine the nature and scope of the threat at its core. Mojtaba Khamenei places the United States and Israel at the forefront, arguing

that their hostility is directed not merely at the Iranian republic or the “Resistance Front,” but at the entire Islamic ummah, including Islamic governments that maintain close relations with Washington. He states, “America’s criminal rulers and the spurious Zionist entity are sworn enemies of this unity and friendship; they are not only enemies of the Islamic Republic, the Iranian people, and the great Islamic Resistance Front, but harbor hostility toward the entire Islamic nation — including the peoples of West Asia and North Africa. This includes even the rulers of these countries, many of whom are considered their collaborators; the public insults and vile language directed at certain leaders of Islamic nations by the heads of ‘Arrogance’ [Global Arrogance] serve as vivid examples still fresh in your memories and our own.”

In this formulation, he criticizes the very states with which he says he seeks rapprochement and unity, accusing them of collaborating with the United States and Israel while disregarding national sovereignty, diplomatic relations and international law. This concept lies at the heart of the divide between the Iranian perspective and the Gulf states’ security outlook: Tehran seeks to alter its position within the Gulf security framework, moving from being viewed as a threat to being regarded as a “natural partner” in confronting a broader threat, while continuing to pursue the same policies and employ the same patronizing rhetoric.

The paradox is that his call for unity is expressed through a forceful and divisive discourse. At its core, it

risks producing the very disunity it claims to oppose through insinuations, assertions of dominance and an egocentric emphasis on Iranian identity and *wilayi* (allegiance-based) identity. Accordingly, this rhetoric of unity appears to be part of a broader Iranian strategy pursuing several objectives, which are examined below.

The Issue of Unity at Home

Hossein Shariatmadari, editor-in-chief of Kayhan and the supreme leader’s representative at the newspaper, restricts the concept of unity within Iran to “loyalists:” those who believe in the revolution and Wilayat al-Faqih, fully submit to them and do not express any opposition or dissent toward the leadership. In this context, he quotes Ali Khamenei as saying, “Our people are at odds with those who desecrated the day of Ashura. The nation is at odds with those who, on Ashura, acted with cruelty, absurdity, and shamelessness — stripping a young Basiji of his clothes and beating him in the street. We shall never reconcile with such people.”⁽³⁰⁾ Shariatmadari then comments, “Reflect carefully! The martyr Supreme Leader — with his characteristic wisdom — asserts that unity with those who have strayed from the fundamentals of Islam and the Revolution is not unity at all; rather, it contradicts the very essence of unity.” He emphasizes, “We are at odds with them, and we will not reconcile with them.” Shariatmadari draws a broader conclusion from this position, “Consensus cannot and must not be sought with individuals and groups that deviate from the principles of the Revolution, the System,

and the Imam — those whom the martyr Supreme Leader described as pinning their hopes on America, imagining that not a single step can be taken without America's favor. Unfortunately, we see individuals and factions from this spectrum present in sensitive positions within the System today under the pretext of consensus! This is a presence that should not exist, as it constitutes a dangerous blight and a 'red line' regarding consensus."

A significant implication is that the concept of unity in Iranian discourse does not appear to accommodate political or intellectual pluralism; rather, it is bounded by ideological limits. Unity is pursued only so long as dissenting parties remain within the parameters defined by revolutionary principles, the regime and the Imam. Once they cross those boundaries — or seek engagement with the United States or the West — they move from the sphere of unity and consensus into the realm of hostility. This creates a striking paradox: how can Iran call on Islamic nations, with their diverse sects and interests, to prioritize common ground over differences while simultaneously using domestic political dissent as the criterion for distinguishing between those who belong to the revolution and those who stand outside it?

This reveals a fundamental tension in the discourse of Wilayat al-Faqih. Externally, unity appears to serve as a means of managing differences; internally, however, it becomes a form of conformity centered on a specific ideological core: the revolutionary establishment, the

supreme leader and the principles of the revolution. This raises a broader question about the nature of the unity Tehran seeks to promote across the Islamic world: is it a union of distinct and equal parties, or a form of unity that tolerates differences only so long as they remain within Iranian definitions of friend and foe and do not challenge the boundaries of its political project?

Conclusion

Mojtaba Khamenei's message to Islamic nations suggests that the concept of "unity" in contemporary Iranian discourse extends well beyond its traditional religious meaning, becoming a vehicle for a broader vision of security, politics and the regional order. The unity proposed in the letter is not an end in itself but a starting point for forging a common position against the "enemy," a definition Iran seeks to control, and for cooperation in defense and economic resources, ultimately leading toward what is described as the "New Islamic Civilization" project. Unity thus becomes part of a political, security and religious framework through which Tehran seeks to reshape and strengthen its regional position, transforming itself from a state viewed as a primary threat into a partner with which other Islamic nations should cooperate against what it presents as a greater threat from the United States and Israel.

The central problem with this vision, however, lies not in the principle of cooperation or rapprochement among Islamic nations but in the ideological conditions Iran seeks to impose on that alignment. Tehran

is not simply calling for differences to be overcome or managed; it also sets specific definitions of friend and foe and prescribes the positions Islamic nations should adopt toward the international order and its alliances, reflecting an underlying logic of tutelage and hegemony in Iranian discourse. This becomes even more apparent when the public rhetoric of unity is contrasted with domestic realities. Writings by figures close to the supreme leader indicate that unity remains conditional on adherence to the “foundational principles of the Revolution, the System, and the Imam,” while those who move beyond these boundaries are excluded from consensus. A fundamental paradox therefore emerges: the same discourse that calls on the broader Islamic world to manage differences and prioritize common ground does not extend the same space to political and ideological dissent at home.

Accordingly, the supreme leader’s message can be understood as an Iranian effort to employ the concept of “Islamic unity” in a more comprehensive way, shifting it from primarily sectarian and proselytizing contexts into the geopolitical and civilizational spheres. Yet the success of this vision beyond Iran’s borders will depend on Tehran’s ability to present unity as a partnership among equals while abandoning rhetoric centered on tutelage, hegemony, threats and instrumentalization. The Gulf states are unlikely to embrace the vision set out in Mojtaba Khamenei’s message unless such rhetoric is accompanied by a tangible strategic shift in Iran’s policies toward its Arab and Islamic neighbors. Their security perceptions have been shaped over decades by a deep history of rivalry and conflict with Iran, as well as by efforts to counter its regional expansion and its mobilization of loyalist groups at the expense of nation states.

Iran's Regional Interactions

Iran-Arab relations saw significant developments in August 2026, reflecting an intensifying indirect confrontation between Syria's new government and the remnants of Iranian influence in the country.

Syria Continues Grappling With the Legacy of Iran's Influence

August 2026 saw significant developments that underscored the expanding indirect confrontation between Syria's new government and the remnants of Iranian influence in the country. The confrontation became particularly evident after an attempt to smuggle weapons into Lebanon was thwarted, while Damascus increased its involvement in regional security arrangements focused on border control and efforts to curb transnational armed groups. These developments came as the Syrian government sought to dismantle the military and security legacy created by the former regime's alliance with Tehran and reassert state control over borders and transit routes.

Dismantling Iranian Influence and Reclaiming Supply Routes

A key element of the Syrian interim government's response to Iranian influence in August 2026 was the closure of arms-smuggling routes. On August 8, internal security forces thwarted an attempt to smuggle weapons and ammunition from Tartus Governorate into Lebanon.⁽³¹⁾ The operation followed the seizure in July of a shipment that had entered Syria from Iraq concealed inside an oil tanker. It contained long-range missiles, guided anti-tank missiles and drones, which were believed to be destined for Hezbollah. These repeated seizures suggest that Syrian authorities regard these operations not as isolated border incidents, but as components of broader supply networks seeking to reconnect Iraq with the Syrian coast and Lebanon.

The importance of these measures goes beyond the quantities of weapons seized, as they seek to change the role of Syrian territory in Iran's regional strategy. Under the Assad regime, Syria was the central link in the land corridor connecting Iran with Iraq and Lebanon, enabling Tehran to support Hezbollah and consolidate its military presence near the Israeli border. The current Syrian government, by contrast, is seeking to turn Syria from a transit zone operating beyond state control into a barrier against the movement of weapons and fighters. This approach is intended to restore the sovereign role of Syria's borders and constrain Iran's ability to maintain links among its regional allies.

The broader scope of this strategy became clearer when investigations into the shipment from Iraq uncovered a network operating across Iraq, Syria and Lebanon, involving individuals who had been linked to arms and drug smuggling under the previous regime.⁽³²⁾ Syria subsequently provided Iraq with a list of those individuals. The Syrian government's response therefore extended beyond intercepting weapons shipments to include intelligence cooperation designed to dismantle the cross-border networks on which Iran and its allies had relied.

Along the same lines, the Syrian-Iraqi border has seen heightened security and military movements amid reports of pro-Iran groups operating in the border area. While the context of some circulated footage allegedly showing a full mobilization of the Syrian army near the Iraqi border remains unverified, the controversy

surrounding it reflects growing concerns about the possible reactivation of Iranian supply routes. For the Syrian state, this approach provides a means of gradually reducing Iranian influence without assuming the costs of a regional confrontation that could weaken state institutions or fuel internal tensions.

Syria's Regional Repositioning and Iran's Stance

The tightening of restrictions on Iranian networks has coincided with swift moves to reintegrate Syria into regional and international security arrangements. A notable development came with a meeting in Amman between the chiefs of staff of Syria, Jordan and Iraq, joined by the minister of Peshmerga Affairs, to discuss border security and transnational threats.⁽³³⁾ Syria's participation is particularly significant because it places management of the Iraq-Syria border within a framework of regional cooperation, as Damascus seeks to prevent pro-Iran groups from exploiting gaps along the border to revive weapons smuggling routes to Hezbollah in Lebanon.

At the same time, the United States removed Syria from its list of state sponsors of terrorism.⁽³⁴⁾ The decision points to a shift in Washington's relationship with Damascus, extending beyond the easing of political and economic restrictions toward Syria's gradual integration into regional security cooperation frameworks. It followed Syria's first participation in a security dialogue organized by US Central Command in Bahrain, which brought together military leaders from the United States and 11 Arab

countries to discuss defense cooperation and maritime security through the Strait of Hormuz.

This opening marks a reversal of Syria's position under the previous regime. Rather than remaining tied to the Iranian axis, the new government is seeking to establish partnerships with Arab states and the United States and to present itself as a capable partner in securing borders, combating smuggling and containing transnational armed groups. Although this creates an opportunity to obtain the political, economic and security support required to rebuild state institutions, it also means that Syria's policy toward Iran is becoming part of a broader regional balancing process rather than simply a bilateral matter between Damascus and Tehran.

The developments outlined above have coincided with an Iranian narrative intended to discourage the Damascus government from dismantling supply routes or taking steps that could affect Hezbollah. This was reflected in a warning by Ali Khazrian, a member of the Iranian Parliament's National Security and Foreign Policy Committee, to President Ahmed al-Sharaa against confronting the group. Khazrian suggested that such a move would accelerate what he described as the "liberation of Syria" by "Resistance" forces.⁽³⁵⁾ The message implicitly suggests that Tehran-aligned armed factions could be mobilized to pressure the Syrian government or place additional strain on its security resources.

Thus, border movements and the possible presence of sleeper cells appear to constitute forms of leverage

that Iran seeks to preserve as its formal influence in Syria declines. Their purpose is to increase the potential cost for Damascus if it moves toward security partnerships that conflict with Iranian interests.

Conclusion

The developments in Syria during August 2026 indicate that Iran's efforts to rebuild its influence have entered a new phase, based on establishing clandestine supply routes, smuggling networks and armed groups capable of operating beyond

the Syrian state's authority. Syria's regional repositioning has provided an external dimension to its domestic efforts to secure its borders and dismantle these networks, while expanded cooperation with neighboring countries and the United States has strengthened Damascus' ability to confront these threats. Nevertheless, Iran retains the capacity to increase the costs of this shift through its allies, remaining networks and threatening rhetoric directed at the Syrian state.

Iran's Relations With International Powers

In the context of Iran's relations with Western powers, the United States has adopted a new strategy toward Tehran centered on economic pressure with the aim of disrupting its foreign trade and compelling it to accept US terms. Iran, in turn, has adopted a strategy of confrontation and escalation centered on economic resistance, military escalation and efforts to increase the cost of war for the United States.

Iran's Response to Operation Economic Outcast

The United States has adopted a new strategy toward Iran centered on economic pressure intended to cripple the country's international trade and compel the government to accept US terms. The campaign is unfolding alongside an unprecedented US military blockade aimed at stopping Iranian oil exports, as well as an intensive effort to sever the economic lifelines that sustain Iran and isolate it commercially and financially, while the prospect of renewed military action remains.

Iran has responded with a strategy of confrontation and escalation built around several key pillars, including economic resistance, military escalation and efforts to increase the cost of war for its adversaries. With diplomacy sidelined and both sides relying on the prospect of an almost complete victory, the confrontation points to increasingly negative prospects and an uncertain future.

This file follows the steps taken by both sides within their respective strategies and assesses the likely direction of the confrontation. The first section examines the nature of US pressure, while the second considers Iran's options and responses.

Current US Pressures

The United States is applying unprecedented pressure on Iran, banking on the further deterioration of the country's internal situation in the aftermath of the war. The strategy is built around intense domestic disputes, including questions over the legitimacy of the new supreme leader

and divisions among key state institutions and political factions over a range of issues, including the decision to retaliate militarily. These tensions are compounded by worsening living conditions and the possibility of public anger erupting at any time. Washington believes that sustained additional pressure could create conditions for protests and potentially trigger a revolution against the ruling establishment.⁽³⁶⁾

In this context, Washington announced Operation Economic Outcast as an extension of existing US sanctions and pressure on Iran. The campaign seeks to consolidate US efforts to close off all avenues for Iran's external economic activity, effectively preventing the government from exporting or importing goods, including oil and petroleum products, and from conducting commercial transactions with other countries. The sanctions also target foreign entities that engage with Iran. For the first time, however, the campaign is being reinforced by a military blockade off Iran's coastline, significantly increasing its effectiveness and impact.

The United States is also reinforcing its strategy through military force and threats of further strikes to weaken Iran's position. These measures include potential plans to forcibly open the Strait of Hormuz, responses to hostile Iranian actions intended to disrupt navigation and threats to strike critical infrastructure capable of paralyzing the country. Together, these actions have created a deterrent that has largely prevented Iran from continuing its attacks.

Through this pressure, Washington seeks to secure an agreement with Iran that would allow Trump to emerge victorious while denying Tehran any strategic gains that could preserve its regional influence vis-à-vis the United States and Israel. Its key objectives include ensuring freedom of navigation through the Strait of Hormuz; reaching a definitive nuclear agreement that eliminates Iran's ability to enrich uranium or develop nuclear weapons in the future; restricting its missile capabilities and preventing Tehran from securing an understanding that the leadership could present as a victory or use to strengthen its legitimacy. In short, Trump seeks to achieve through this campaign of "fury" outcomes that military action alone could not deliver, an ambition reinforced by Iran's deteriorating domestic situation.

Iran's Options

The Iranian ruling establishment views its current confrontation with the United States as a struggle for survival against the world's dominant power, while fully recognizing the stark imbalance in military capabilities and global influence between the two sides. Nevertheless, because it regards the conflict as existential — and sees Washington's attempt to impose a diplomatic surrender as no less dangerous than military defeat — Tehran has adopted a strategy focused on attrition, buying time and increasing the cost of the confrontation.

At the center of this strategy is the policy of "economic resistance." Iran has nearly five decades of experience, dating back to the 1979 revolution, in

dealing with US sanctions and economic pressure and has developed a range of interconnected mechanisms for circumventing them. These include a "shadow fleet" used to smuggle oil, "neighborhood diplomacy" aimed at securing alternative trade routes through neighboring countries and networks for illicit financial transfers and alternative payment systems designed to bypass disruptions to SWIFT-based transactions.

Iran also relies on China and Russia as trading partners, bringing together countries that share opposition to US hegemony and its sanctions regimes. At the same time, Tehran uses the threat of closing strategic maritime chokepoints — the Strait of Hormuz and the Bab al-Mandab Strait — as an instrument of economic deterrence. The strategy is intended to counter US economic pressure by increasing the costs of the conflict for both the United States and global economies, while also threatening to prevent regional states from exporting their own oil products for as long as Iran remains unable to maintain its exports. Iran is banking on the potential damage this approach could inflict on the US economy, as well as its possible impact on Trump's standing and that of the Republican Party ahead of the November 2026 midterm elections.

However, given the unprecedented pressures created by the military and economic blockade, Iran has not ruled out launching attacks to break the siege or even changing the existing rules of engagement. This shift in military tactics was evident in attacks targeting US ships and naval vessels, alongside the usual measures aimed

at disrupting navigation through the Strait of Hormuz and preventing the United States from forcibly re-opening the waterway. Iran has also threatened to establish an exclusion zone extending across the Gulf to the perimeter of the US-imposed blockade, according to a statement by Mohsen Rezaei, secretary of the Supreme National Security Council.⁽³⁷⁾

Conclusion

Both the United States and Iran are relying on their respective sources of leverage to resolve the current conflict, with neither side appearing willing to make substantive concessions that could break the diplomatic deadlock. This has made it difficult

for mediators to persuade either side to move toward a political settlement. As a result, escalation is likely to shape the next phase. Trump is counting on the economic blockade to weaken the Iranian leadership's domestic legitimacy and isolate it internationally, while Iran is using every available means to influence energy prices and shape the course of the current escalation. Ultimately, the focus remains on Trump's ability to manage the challenge, particularly as the Bab al-Mandab Strait has emerged as a significant factor in the conflict.

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