

Iran Update



Iran Update, July 6, 2025

Carolyn Moorman, Avery Borens, Katherine Wells, Andie Parry, and Brian Carter

Information Cutoff: 2:00PM ET

Iran is targeting minorities for perceived disloyalty, which will almost certainly reinforce pre-existing anti-regime sentiment and could spark more unrest over time. British media reported on July 6 that armed Iranian “intelligence agents” have conducted dozens of coordinated raids across Iran targeting Bahai religious minority members.[1] Iranian authorities reportedly seized electronic devices, personal belongings, and religious material that is being treated as contraband.[2] Bahai members have frequently been accused of espionage and anti-regime activities.[3] Iran’s aggressive targeting of minorities for perceived disloyalty may not act as the proximate trigger for major protests, but it will contribute to frustrations that could explode into mass protests after a salient event, as happened during the Mahsa Amini protests. The death of Mahsa Amini in police custody acted as the proximate cause for protests in Tehran that rapidly expanded to Kurdish areas of Iran in Fall 2022. The regime has long oppressed Iranian Kurds, but Mahsa Amini’s death acted as a salient event that caused unexpected unrest.[4]

Iran has arrested over 700 individuals on espionage accusations since the start of the Israel-Iran War on June 12.[5] The arrests include several individuals whom the regime characterized as “Mossad spies.”[6] Regime authorities, for example, arrested someone they called a Mossad “associate” on July 6 for collecting information on military sites and attempting to send the information to “hostile intelligence services.”[7] First Deputy of the Iranian Judiciary Hamzeh Khalili stated on June 27 that the judiciary will pursue Israeli “spies” and called on Iranians to inform the authorities of any dangerous or suspicious activities.[8] CTP-ISW assessed on June 27 that Iran’s concern about Israeli infiltration and covert operations in Iran may be used as justification for broader crackdowns on society.[9]

Key Takeaways:

- Iran is targeting minorities for perceived disloyalty, which will almost certainly reinforce pre-existing anti-regime sentiment and could spark more unrest over time. Iran’s aggressive targeting of minorities for perceived disloyalty may not act as the proximate trigger for major protests, but it will contribute to frustrations that could explode into mass protests after a salient event, as happened during the Mahsa Amini protests.
- Supreme Leader Ali Khamenei made his first public appearance since moving to a secure location on June 12 at the start of the Iran-Israel War.
- Likely Houthi fighters attacked a Liberian-flagged ship off the coast of Hudaydah, Yemen, on July 6.

Supreme Leader Ali Khamenei made his first public appearance since moving to a secure location on June 12. He attended a public religious ceremony for the Shia festival of Ashura at Imam Khomeini Hosseinyeh Mosque in Tehran on July 5.[10] Ashura is an important Shia religious holiday that mourns the Prophet Mohammad's grandson, Imam Hossein.[11] It would be very significant if Khamenei did not attend the ceremony, and there is much less risk that Israel would attempt to kill Khamenei due to the ceasefire. Khamenei stated that Iran will "never surrender" to Israel during the ceremony, which is consistent with post-war Iranian messaging.[12]

An internet monitoring group has reported "major disruptions" to internet connectivity across Iran since CTP-ISW's last data cutoff on July 5.[13] An Iranian OSINT analyst reported that the internet disruptions began after Supreme Leader Khamenei appeared in public for the first time since the start of the Israel-Iran War.[14]

The Houthis launched a ballistic missile targeting Ben Gurion Airport in central Israel on July 5.[15] The Israel Defense Forces (IDF) intercepted the missile before it entered Israeli airspace.[16] The Houthis have launched hundreds of drones and ballistic missiles targeting Israel since the Houthis began their campaign to enforce an economic blockade on Israel in November 2023.[17]

Likely Houthi fighters attacked a Liberian-flagged ship off the coast of Hudaydah, Yemen, on July 6.[18] The vessel's crew said that the vessel has an armed guard aboard, according to commercially available maritime tracking information.[19] The Houthis have not claimed the attack at the time of this writing, which could suggest that Houthi commanders did not authorize this attack. Houthi media is publicizing the attack, however.[20] Fighters on eight small vessels reportedly fired small arms, rocket-propelled grenades, and naval drones at the vessel, which caused a fire onboard.[21] A maritime security company reported that at least two one-way attack naval surface drones collided with the ship.[22] Armed security aboard the vessel returned fire at the likely Houthi fighters.[23] The ship is reportedly immobile, and the crew has abandoned the vessel.[24] The Houthis have not attacked a merchant vessel in the Red Sea since November 2024, though they have attacked US Navy warships.[25]

Likely Houthi Attack on a Vessel in the Red Sea, July 6, 2025





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Iran Update



**Ria Reddy, Nidal Morrison, Ben Schmida, Carolyn Moorman,
Andie Parry, and Annika Ganzeveld**

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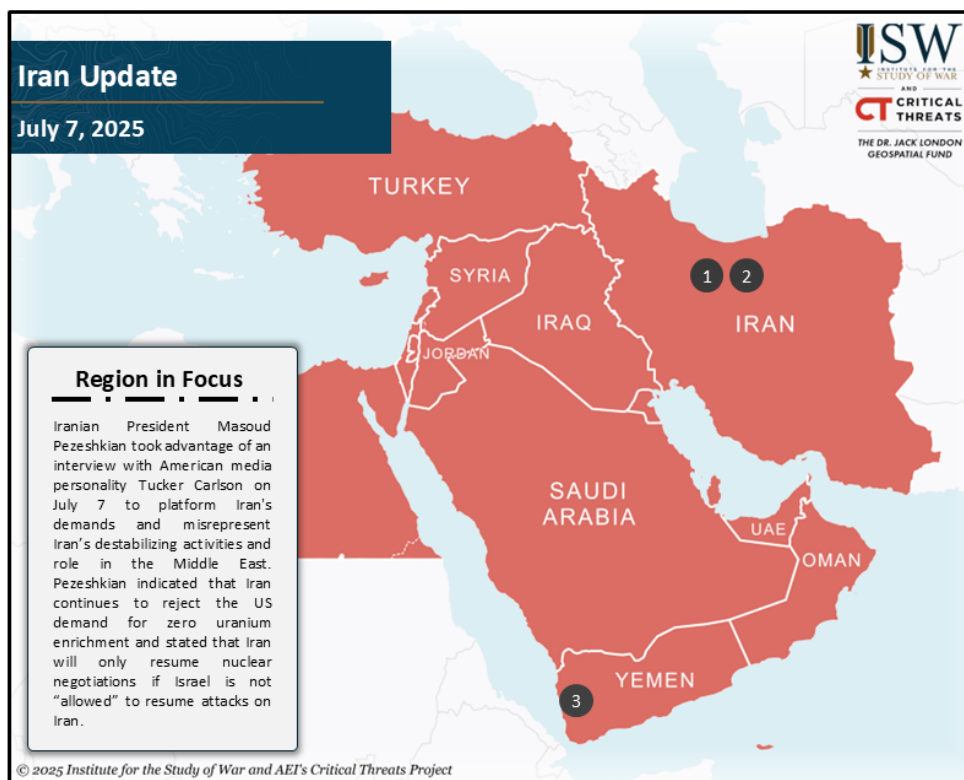
The Critical Threats Project (CTP) at the American Enterprise Institute and the Institute for the Study of War (ISW) publish the Iran Update, which provides insights into Iranian and Iranian-sponsored activities that undermine regional stability and threaten US forces and interests. CTP-ISW publishes the Iran Update daily.

Click [here](#) to see CTP and ISW's interactive map of assessed control of terrain in Syria, and [here](#) to see CTP and ISW's interactive map of Israeli ground operations. The Syria map is updated daily alongside the static Syria maps in this report. CTP-ISW ended daily maps of Israeli ground operations in February 2025.

Click [here](#) to see ISW-CTP's interactive map showing the total strikes in Iran since June 12, as well as an interactive timelapse showing the strikes day-by-day.

Key Takeaways

- Iranian President Masoud Pezeshkian took advantage of an interview with American media personality Tucker Carlson on July 7 to platform Iran's demands and misrepresent Iran's destabilizing activities and role in the Middle East. Pezeshkian leveraged the interview to falsely present Iran as a peaceful force in the Middle East to a Western audience.
- Senior Iranian officials have claimed that Iran retains a significant missile stockpile that it can use to attack Israel. Israeli airstrikes on Iran between June 12 and 24 likely degraded Iran's missile program, however.
- The Israel Defense Forces (IDF) struck several Houthi targets in Hudaydah Governorate, Yemen. The Israeli strikes follow a Houthi ballistic missile attack targeting Ben Gurion Airport in central Israel on July 5.
- The Houthis claimed responsibility for a July 6 complex attack targeting the Liberian-flagged bulk carrier *Magic Seas* off the coast of Hudaydah, Yemen. The Houthis had not attacked a merchant vessel in the Red Sea since November 2024. This attack highlights that the Houthis remain capable of resuming attacks on ships whenever they want and for reasons they choose.



- 1 **TEHRAN, IRAN.** Iranian President Masoud Pezeshkian took advantage of an interview with American media personality Tucker Carlson on July 7 to platform Iran's demands and misrepresent Iran's destabilizing activities and role in the Middle East. Pezeshkian leveraged the interview to falsely present Iran as a peaceful force in the Middle East to a Western audience.
- 2 **TEHRAN, IRAN.** Senior Iranian officials have claimed that Iran retains a significant missile stockpile that it can use to attack Israel. Israeli airstrikes on Iran between June 12 and 24 likely degraded Iran's missile program, however.
- 3 **HUDAYDAH, YEMEN.** The Israel Defense Forces (IDF) struck several Houthi targets in Hudaydah Governorate, Yemen. The IDF targeted Hudaydah, Ras Issa, and Salif ports, as well as the Ras al Khatib power station. The IDF also struck a vessel that the Houthis seized in November 2023.

Iranian President Masoud Pezeshkian took advantage of an interview with American media personality Tucker Carlson on July 7 to platform Iran's demands and misrepresent Iran's destabilizing activities and role in the Middle East.[1] Pezeshkian leveraged the interview to falsely present Iran as a peaceful force in the Middle East to a Western audience. Pezeshkian stated that Iran has never sought and will never seek a nuclear weapon.[2] The International Atomic Energy Agency (IAEA) confirmed in May 2025 that Iran conducted undeclared nuclear activities that could support the development of nuclear weapons at three locations in Iran until the early 2000s.[3] The IAEA also reported in May 2025 that Iran possessed 408.6 kilograms of 60 percent enriched uranium, which is enough uranium, if enriched further, to produce nearly 10 nuclear weapons.[4] Pezeshkian claimed that Iran has "never shied away from [IAEA] verification" and is

"ready for another inspection." [5] Iran has historically restricted IAEA oversight in Iran, including by withdrawing the certifications of several inspectors in 2023. [6] Iran's Guardian Council approved a bill on June 26 that suspends Iran's cooperation with the IAEA and bars inspectors from accessing Iran's nuclear facilities. [7] Pezeshkian also claimed that Iran has "always been after peace." [8] Iran has cultivated a transnational coalition of partners and proxies since 1979 to pursue its strategic interests, including expelling the United States from the Middle East and destroying the Israeli state. Iran and the Axis of Resistance have conducted numerous attacks against Israel and US forces across the region. Iran supported the Axis of Resistance against Israel during the October 7 War and has sought to reconstitute its proxies, such as Hezbollah, after the war.

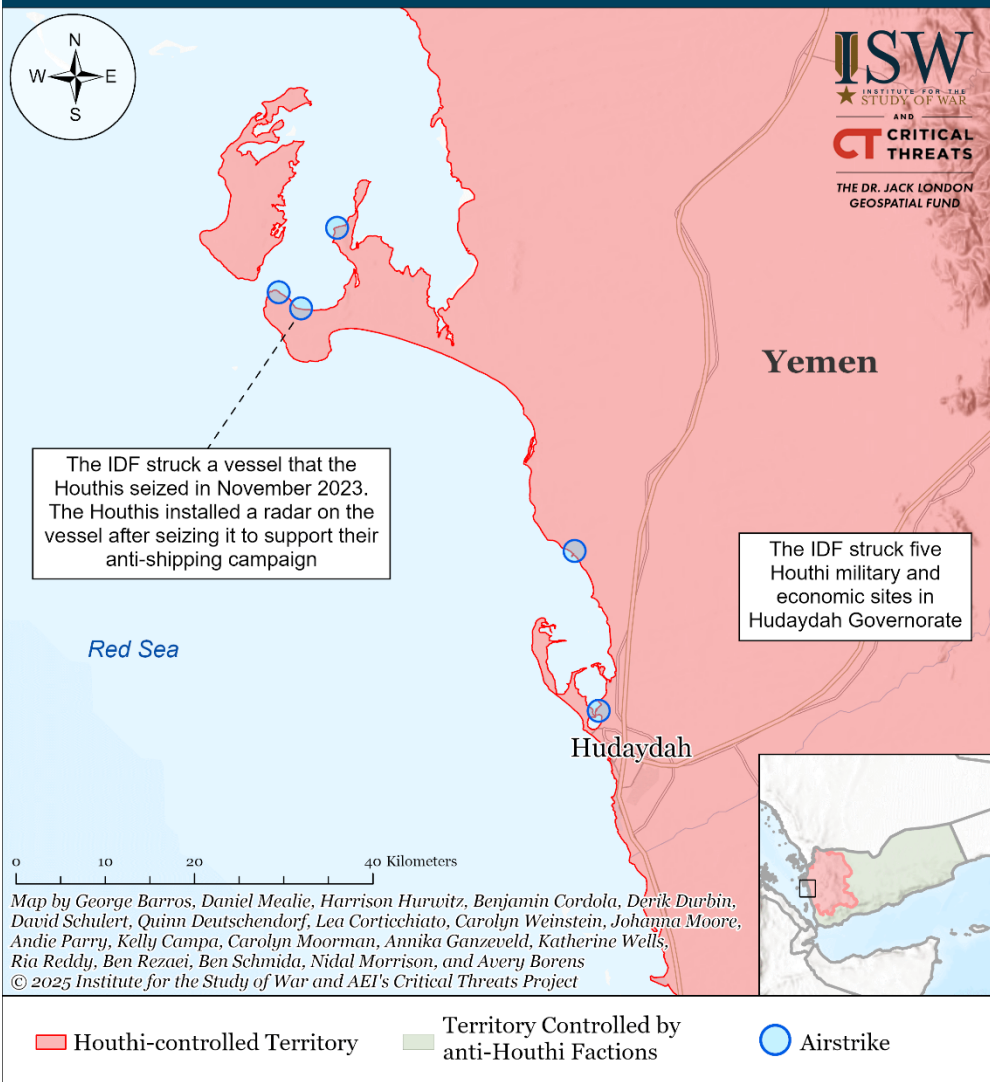
Pezeshkian separately reiterated Iran's demands for nuclear negotiations. Pezeshkian indicated that Iran continues to reject the US demand for zero uranium enrichment and stated that Iran will only resume nuclear negotiations if Israel is not "allowed" to resume attacks on Iran. Senior US and Israeli officials have indicated that they could resume attacks on Iran if Iran attempts to reconstitute its nuclear program. [9]

Senior Iranian officials have claimed that Iran retains a significant missile stockpile that it can use to attack Israel. [10] Israeli airstrikes on Iran between June 12 and 24 likely degraded Iran's missile program, however. Supreme Leader Military Affairs Adviser Major General Yahya Rahim Safavi stated on July 7 that Iran has produced thousands of missiles and drones and warned that Iran still retains the capability to attack Israel. [11] The IDF reported on June 17 that it had destroyed "about half" of Iran's ballistic missile launchers and between 35 to 45 percent of Iran's ballistic missile stockpile. [12] Israeli airstrikes also destroyed at least 20 Iranian missile bases and several factories related to Iran's ballistic missile program. [13]

The Israel Defense Forces (IDF) struck several Houthi targets in Hudaydah Governorate, Yemen, on July 6. [14] The IDF targeted Hudaydah, Ras Issa, and Salif ports, as well as the Ras al Khatib power station. [15] The IDF also struck a vessel that the Houthis seized in November 2023. The Houthis installed a radar on the vessel after seizing it to support their anti-shipping campaign in the Red Sea. The Israeli strikes follow a Houthi ballistic missile attack targeting Ben Gurion Airport in central Israel on July 5. [16] Israel intercepted the missile before it entered Israeli airspace. [17] Israel last struck Houthi targets in Yemen on June 10. [18]

The Houthis claimed on July 7 that they conducted multiple ballistic missile and drone attacks targeting Israel in response to the Israeli airstrikes on Hudaydah Governorate. [19] The Houthis claimed that they launched ballistic missiles at Ben Gurion Airport, Ashdod Port, and the Ashkelon power station, as well as eight drones at Eilat Port. The IDF fired interceptors at two Houthi ballistic missiles on July 6, and a third Houthi ballistic missile fell before it reached Israeli territory on July 7. [20] The IDF also intercepted a Houthi drone on July 7. [21]

Israeli Airstrikes near Hudaydah July 7, 2025 at 2:00 PM EST



The Houthis claimed responsibility for a July 6 complex attack targeting the Liberian-flagged bulk carrier *Magic Seas* off the coast of Hudaydah, Yemen.[22] Houthi military spokesperson Yahya Sarea claimed on July 7 that the ship had completely sunk.[23] The *Magic Seas* was carrying fertilizer near the Zubair Islands when Houthi fighters on eight small vessels fired small arms, rocket-propelled grenades, and at least two one-way attack naval surface drones at the ship.[24] A Yemen analyst suggested that Houthi fighters used one-way attack naval surface drones and fast attack craft to attack the *Magic Seas* to conserve the group's stockpile of anti-ship ballistic and cruise missiles following the Israel-Iran War.[25] Iran has reportedly provided the Houthis with anti-ship ballistic and cruise missiles and helped the group develop its anti-ship missile manufacturing capabilities.[26] The IDF struck several missile production facilities in Iran during the Israel-Iran War. It is possible that Iran used some of these facilities to produce missiles or missile components for its proxies and partners, including the Houthis.

The Houthis claimed that they targeted the *Magic Seas* because the vessel belonged to a company that has repeatedly “violated” the Houthis’ ban on ships entering Israeli ports.[27] The Houthis have launched hundreds of drones and missiles targeting Israel and vessels near Yemen since the Houthis began their campaign to enforce an economic blockade on Israel in November 2023.[28] This campaign has frequently targeted vessels that have no clear ties to Israel, however.[29] The Houthis had not attacked a merchant vessel in the Red Sea since November 2024, though they have attacked US Navy warships.[30] The Houthis agreed to a ceasefire with the United States in May 2025, in which the Houthis agreed to cease attacks on international shipping.[31] The Houthis remain capable of resuming attacks on ships whenever they want and for reasons they choose, despite the ceasefire.

Houthi attacks on international shipping impose an economic toll on the United States and the broader international community. Shipping costs around the Red Sea and Gulf of Aden increased significantly after the Houthis began attacking vessels there in October 2023. These costs have yet to return to their pre-October 2023 levels, even though the Houthis did not conduct any attacks between November 2024 and July 6.[32] The resumption of Houthi attacks will likely raise shipping costs further, as transit around Yemen becomes riskier and international shipping companies take longer and more expensive routes around the Cape of Good Hope.[33]

BRICS member states reiterated their diplomatic support for Iran during the 2025 BRICS Summit in Brazil. Iranian Foreign Affairs Minister Abbas Araghchi attended the summit in Rio de Janeiro on July 6 and 7.[34] Russian Foreign Affairs Minister Sergei Lavrov offered Russia’s diplomatic assistance to resolve the Iranian nuclear issue during a meeting with Araghchi on July 6.[35] The Russian Foreign Affairs Ministry condemned the US and Israeli strikes on Iran and stressed that all issues surrounding Iran’s nuclear program must be resolved through diplomacy.[36] Reuters previously reported on June 23 that Iran was unsatisfied with Russia’s support for Iran during the Israel-Iran War, citing unspecified Iranian sources.[37] Araghchi also met with officials from South Africa, Malaysia, Brazil, and Turkey at the summit.[38] BRICS member states declared on July 6 that the strikes on Iran violated international law and the United Nations Charter.[39]

The IDF detained Islamic Revolutionary Guards Corps (IRGC) Quds Force operatives along the Golan Heights-Syria border on July 7.[40] Israeli forces entered Syrian territory to detain seven individuals in Kwdana, Quneitra Province.[41] Israeli forces transferred the detainees to Israeli territory for questioning.[42] The IDF said that the individuals posed a threat to an IDF outpost in the area.[43] The IDF conducted a similar operation in southern Syria on July 2, after which it released three men whom it had identified as members of an Iranian cell.[44]

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Katherine Wells, Ben Rezaei, Avery Borens, Carolyn Moorman, Ben Schmida, and Brian Carter

July 8, 2025 Information Cutoff: 2:00 PM ET

Iranian Foreign Affairs Ministry spokesperson Esmail Baghaei denied on July 8 US President Donald Trump’s July 7 claim that Iran requested nuclear talks.^[1] Western and regional officials told Reuters on July 8 that Iran may “drag out” the talks to avoid either renewed airstrikes if negotiations fail or “humiliation at home” if Iran accepts the US demand for zero uranium enrichment.^[2] US Special Envoy to the Middle East Steve Witkoff will meet with Iranian Foreign Affairs Minister Abbas Araghchi in Oslo in the coming days for nuclear talks, according to an Axios report on July 3.^[3] A Tehran-based Western news correspondent later confirmed on July 4 that preparations are underway for “indirect” negotiations between Witkoff and Araghchi but noted that the meeting has not been finalized.^[4] The Iranian official position against halting uranium enrichment and missile and drone production has not changed, however. It is therefore unlikely that nuclear negotiations would have a successful outcome in the aftermath of the Israel-Iran war if the current positions remain the same.

Top Iranian officials have continued to argue that US-Iranian nuclear negotiations were “gaining momentum” prior to Israeli airstrikes, which is false. Iranian Foreign Minister Abbas Araghchi incorrectly claimed that US-Iran negotiations had “gained momentum” prior to the Israeli air campaign.^[5] US President Donald Trump publicly threatened force against Iran on April 12 if Iran did not agree to a nuclear deal within 60 days of the start of talks.^[6] Israel began its airstrikes on June 12-13, one day after Trump’s 60-day deadline. The United States had not altered its demand that Iran seek no uranium enrichment, and Iran had not altered its demand that it be allowed to continue enrichment. It is misleading to frame these talks as having meaningfully advanced when fundamental disagreements over nuclear enrichment continued to persist. Araghchi’s statements and tone echoed those of Iranian President Masoud Pezeshkian during his July 7 interview with American media personality Tucker Carlson, suggesting that the Iranian government is orchestrating an information campaign targeting Western audiences.^[7] ^[8] Iran even expanded its nuclear program during the negotiating period, according to the International Atomic Energy Agency (IAEA)’s recent reports.^[9] The amount of enriched uranium and the level to which it was enriched had no civilian use.

Iran cannot access certain key nuclear facilities, according to the Iranian president. This suggests that leaked Iranian signals intercepts about limited damage at the nuclear facilities were inaccurate. ^[10] Iranian President Masoud Pezeshkian told Tucker Carlson that US airstrikes on June 22 damaged Fordow, Natanz, or Esfahan nuclear sites, but Iran cannot access the facilities to accurately assess the damage in an interview aired on July 7.^[11] Pezeshkian did not draw differences in levels of access between the different facilities. Pezeshkian’s statement demonstrates that

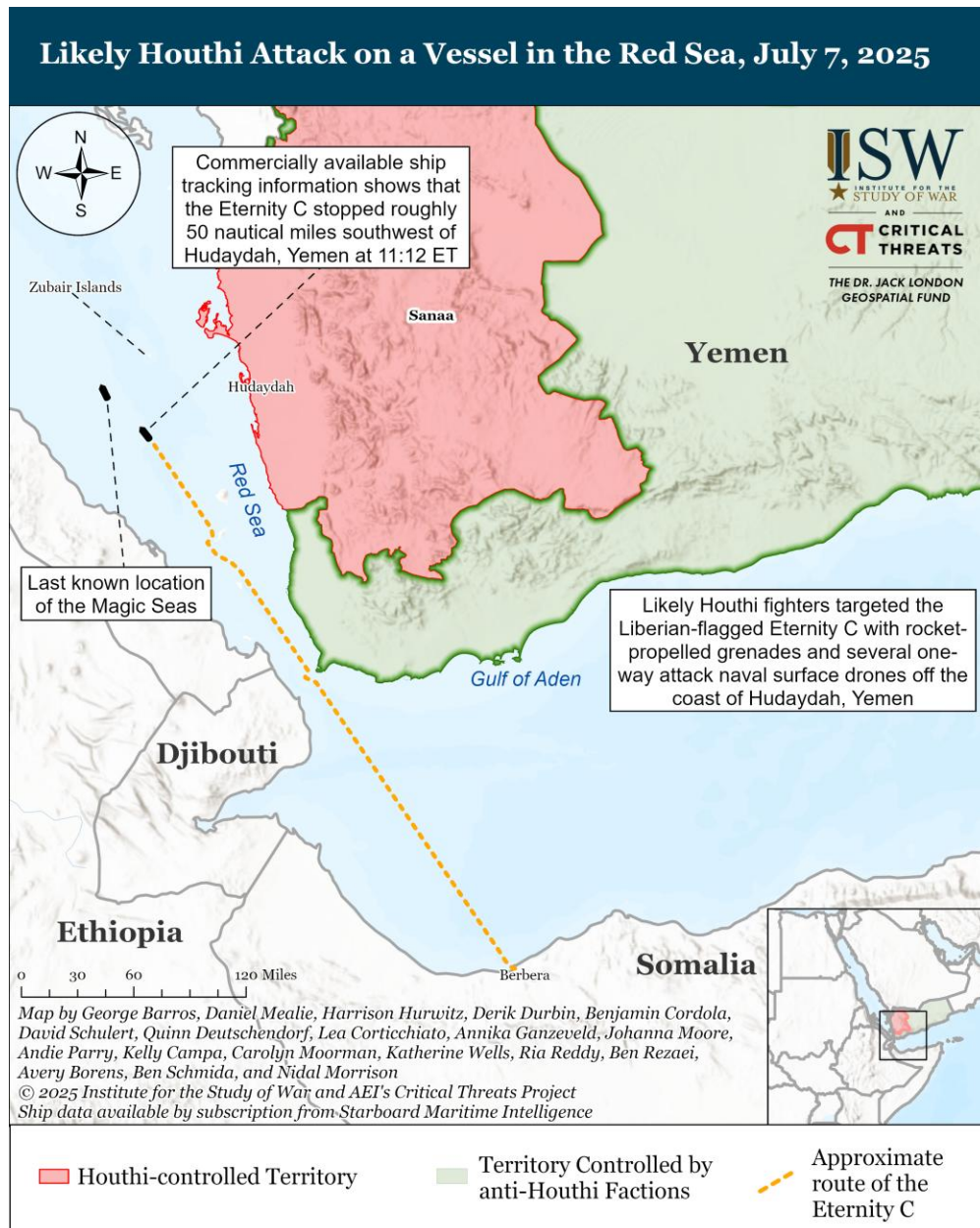
it would have been almost impossible for Iranian officials to have accurate knowledge within days of the strikes about the extent of damage that the facilities suffered. The statement also suggests that Iran's understanding of the exact damage within the facilities remains limited.

Israeli officials suggested that the United States would support further Israeli airstrikes against Iran if Iran attempts to either rebuild its nuclear program or move highly enriched uranium from previously targeted nuclear sites.^[12] Unspecified US officials reportedly left Israeli Strategic Affairs Minister Ron Dermer with the "impression" that the United States would support further Israeli airstrikes on Iran under certain conditions after Dermer's meetings in Washington last week. These conditions include Iranian efforts to rebuild its nuclear program or to move highly enriched uranium from Fordow, Natanz, or Esfahan, according to two sources familiar with the matter speaking to Axios on July 7.^[13] US airstrikes on these facilities on June 22 "sealed off" the enriched uranium inside the three damaged nuclear sites but did not destroy all the nuclear material or infrastructure, according to unspecified US and Israeli officials speaking to Axios on July 7.^[14] The enrichment level of the nuclear material at these sites and whether Iran moved some of the enriched material prior to the strikes is unclear.

The People's Liberation Army Navy (PLAN) harassed a German aircraft supporting the EU mission to defend international shipping in the Red Sea, which could decrease the ability of US partners to defend the freedom of navigation in the Red Sea against the Houthis. The German Foreign Affairs Ministry said on July 8 that a People's Republic of China (PRC) PLAN ship used a laser to harass a German surveillance aircraft operating in the Red Sea in early July.^[15] The German Foreign Affairs Ministry said that the PLAN ship lasered the civilian-contracted German aircraft "without any reason" or prior contact while the aircraft had been operating under the European Union (EU)'s mission to protect merchant vessels from Houthi attacks in the Red Sea.^[16] The Ministry added that the aircraft and its crew, which included German army personnel, had resumed operations since the incident. The German aircraft is based in Djibouti, where the PLA has a military base.^[17] The PLAN has previously used lasers to harass US aircraft operating from Djibouti, as well.^[18] The United States and Australia have previously accused the PLAN of using lasers against US and Australian aircraft in the Pacific Ocean.^[19] The PRC does not actively support the Houthis in the Red Sea, but PRC harassment of vessels and assets supporting the defense of international shipping can pull these assets off station and make them unable to fulfill their mission. This result, in turn, would mean that the net effect of PRC behavior supports Houthi operations even if the PRC does not intend to do so.

Likely Houthi militants conducted a complex attack targeting the Liberian-flagged bulk carrier *Eternity C* off the coast of Hudaydah, Yemen, on July 7.^[20] Likely Houthi fighters on several small vessels attacked *Eternity C* with at least five rocket-propelled grenades and several one-way attack naval surface drones.^[21] The United Kingdom Maritime Trade Operations (UKMTO) reported that the vessel sustained significant damage and lost all propulsion.^[22] The attack killed at least two crew members.^[23] UKMTO previously reported that the vessel was under continuous attack as of 3:34 AM ET on July 8.^[24] The Houthis previously conducted a similar complex attack targeting the Liberian-flagged bulk carrier *Magic Seas* off the coast of Hudaydah, Yemen, on July 6.^[25] Both vessels were traveling near the Zubair Islands at the time of the attacks, which suggests that a Houthi cell is likely operating from the Zubair Islands.^[26] The Houthis previously used these islands during

the October 7 War to attack vessels and appear to be doing so again.[27] It is also possible that the Houthis launched the vessels from Hudaydah and used the Zubair Islands as a way station. The Houthis have not claimed the attack at the time of this writing.



Key Takeaways

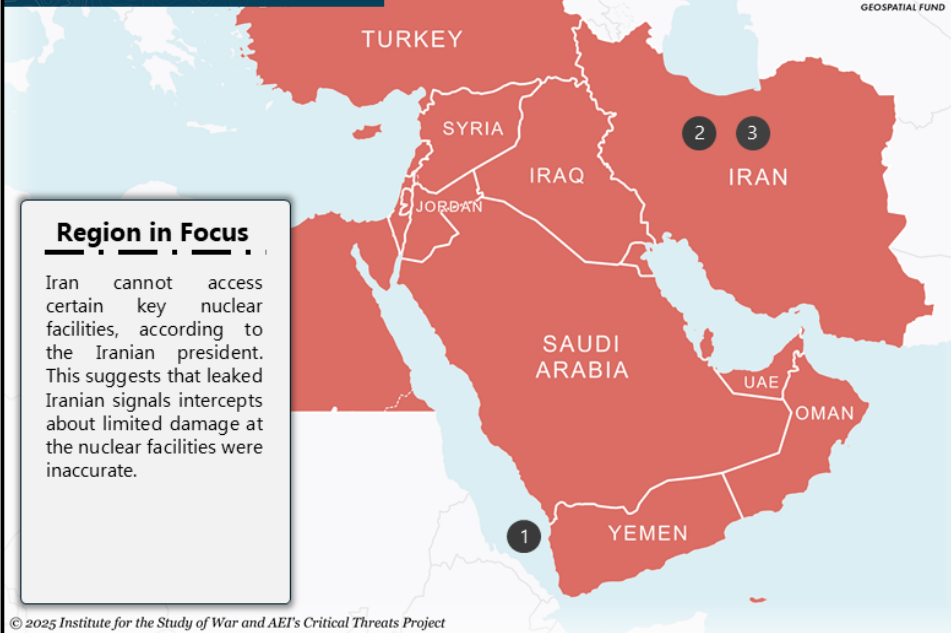
- Top Iranian officials have continued to argue that US-Iranian nuclear negotiations were “gaining momentum” prior to Israeli airstrikes, which is false. It is misleading to frame these talks as having meaningfully advanced when fundamental disagreements over nuclear enrichment continued to persist.
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correspondent later confirmed on July 4 that preparations are underway for “indirect” negotiations between Witkoff and Araghchi but noted that the meeting has not been finalized.

- Iran cannot access certain key nuclear facilities, according to the Iranian president. This suggests that leaked Iranian signals intercepts about limited damage at the nuclear facilities were inaccurate.
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Iran Update

July 8, 2025



Region in Focus

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- 1 **RED SEA.** The People's Republic of China (PRC) navy harassed a German aircraft supporting the EU mission to defend international shipping against Houthi attacks. The PRC does not actively support the Houthis, but the harassment could cause allied aircraft to be unable to support efforts to defend against the Houthis.
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- 3 **TEHRAN, IRAN.** Iranian Foreign Affairs Ministry spokesperson Esmail Baghaei denied on July 8 US President Donald Trump's July 7 claim that Iran requested nuclear talks. A Tehran-based Western news correspondent later confirmed on July 4 that preparations are underway for "indirect" negotiations between Witkoff and Araghchi but noted that the meeting has not been finalized.

Iranian Artesh Air Force Commander Brigadier General Hamid Vahedi inspected the 8th Tactical Airbase (TAB) in Esfahan Province and the 4th TAB in Khuzestan Province on July 7, following Israeli strikes on these bases during the Israel-Iran War.[28] Israeli airstrikes targeting the 8th TAB on June 17 and June 23 damaged runways and hangars and destroyed several Iranian Artesh Air Force fighter jets stationed at the base.[29] Israel separately struck the 4th TAB on June 21 as part of its campaign to degrade Iranian airpower.[30] The Israel Defense Forces (IDF) Air Force reported on June 23 that it struck at least six Iranian airbases across western, eastern, and central Iran to strengthen Israeli air superiority.[31] The IDF Air Force said that its strikes disabled runways and destroyed F-14s, F-5s, and AH-1 Cobra attack helicopters intended to disrupt Israeli operations, which the IDF said degraded Iran's ability to launch counter-air missions.[32]

Iranian Assembly of Experts member Sadegh Pishnamazi called on July 8 for the “inspection” of ships and the seizure of “enemy-related cargoes” in the Strait of Hormuz to “deter future attacks and strengthen Iran’s bargaining power.”^[33] The Strait of Hormuz is not Iranian waters, and inspection in these waters would be tantamount to a hijacking.^[34] Pishnamazi's remarks follow the Iranian Parliament's June 22 approval of a measure to close the Strait of Hormuz, which awaits final approval from the Supreme National Security Council.^[35] Iran has previously threatened to disrupt international shipping in response to US and Israeli strikes on its nuclear facilities.^[36]

Pishnamazi also defended Iran's decision to suspend cooperation with the IAEA and stated that the suspension “prevents foreign spies” from identifying weaknesses and launching new attacks.^[37] The IAEA did not facilitate spying on Iranian facilities, and the IAEA reports were not the proximate trigger for Israel's air campaign, as CTP-ISW has previously noted.^[38] Pishnamazi urged upgrades to Iran's nuclear facilities to meet national needs and bolster deterrence, and added that Iran should increase uranium enrichment to 90 percent to “strengthen its defensive posture and counter adversaries.”^[39] The Assembly of Experts stated in May 2025 that Iran's “peaceful use” of nuclear technology is an “undeniable and inalienable right.”^[40] The Assembly of Experts is an 88-member elected clerical body tasked with the appointment, supervision, and removal of the Supreme Leader.^[41]

The US State Department revoked the Foreign Terrorist Organization (FTO) designation for Hayat Tahrir al Sham (HTS) on July 8.^[42] The State Department justified its decision to remove the FTO designation by citing the dissolution of HTS and the commitment of the Syrian transitional government to combat terrorism in all forms.^[43] US Secretary of State Marco Rubio said that removing the FTO is part of the Trump administration's vision of a “stable, unified, and peaceful Syria.”^[44] Trump signed an executive order on June 30 that terminated a US sanctions program on Syria but maintained sanctions on former Assad regime members.^[45] A senior Trump administration official said that the administration intends to try to suspend the 2019 Caesar Syria Civilian Protection Act, which will require congressional action.^[46] The Caesar Act dissuades long-term foreign investment into Syria out of fear of violating US sanctions.^[47]



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Iran Update



Ria Reddy, Ben Rezaei, Katherine Wells, Avery Borens, Ben Schmida, Kelly Campa, Parker Hempel, and Brian Carter

Information Cutoff: July 9, 2025, 2:00 PM ET

Russia offered to help replenish Iran's depleted uranium stockpile to support a peaceful nuclear program.^[1] CTP-ISW previously assessed that Russia's involvement in the US-Iran nuclear talks would be very unlikely to secure US interests due to Russia's alignment with Iran.^[2] Russian Foreign Affairs Minister Sergei Lavrov stated on July 8 that Russia can receive and downblend Iran's enriched uranium stockpile and return it to supply Iranian nuclear power plants. ^[3]Downblending is the process of converting highly enriched uranium into low-enriched uranium. Russia previously accepted 11,000 kilograms of enriched uranium from Iran in December 2024 in exchange for natural uranium as part of the JCPOA.^[4] Russia also has previously offered to accept Iran's enriched uranium to "provide assistance" to the United States and Iran during the US-Iran nuclear negotiations before the Israel-Iran war.^[5] Neither the United States nor Iran accepted Russia's offer to mediate. Russia has repeatedly opposed the stated US demands in the negotiations by supporting Iran's right to enrich uranium and has consistently supported the Axis of Resistance against Israel.^[6]

French Director General of External Security Nicolas Lerner told French media on July 8 that Iran's nuclear program is very seriously damaged and its weaponization timeline is extremely delayed, which is consistent with previous reports.^[7] Lerner did note that Iran still retains a significant portion of its enriched uranium stockpile. Lerner stated that the US and Israeli strikes have "very seriously affected, very seriously damaged...and extremely delayed" all aspects of Iran's nuclear program.^[8] Lerner said that the strikes "destroyed" a small part of Iran's enriched uranium stockpile but claimed that Iran still retains most of its stockpile.^[9] He added that France has "indications" of the stockpile's location but cannot confirm the details until the International Atomic Energy Agency (IAEA) resumes its verification activities at Iranian nuclear facilities.^[10] The IAEA did not have access to all of the possible facilities Iran could use to store enriched uranium, so it is unclear how the IAEA is critical to confirming these details. Israeli intelligence, for example, has consistently provided exclusive information about Iran's nuclear program that the IAEA has not provided (at least publicly). The enrichment level of the enriched material that Iran reportedly retains is unclear.

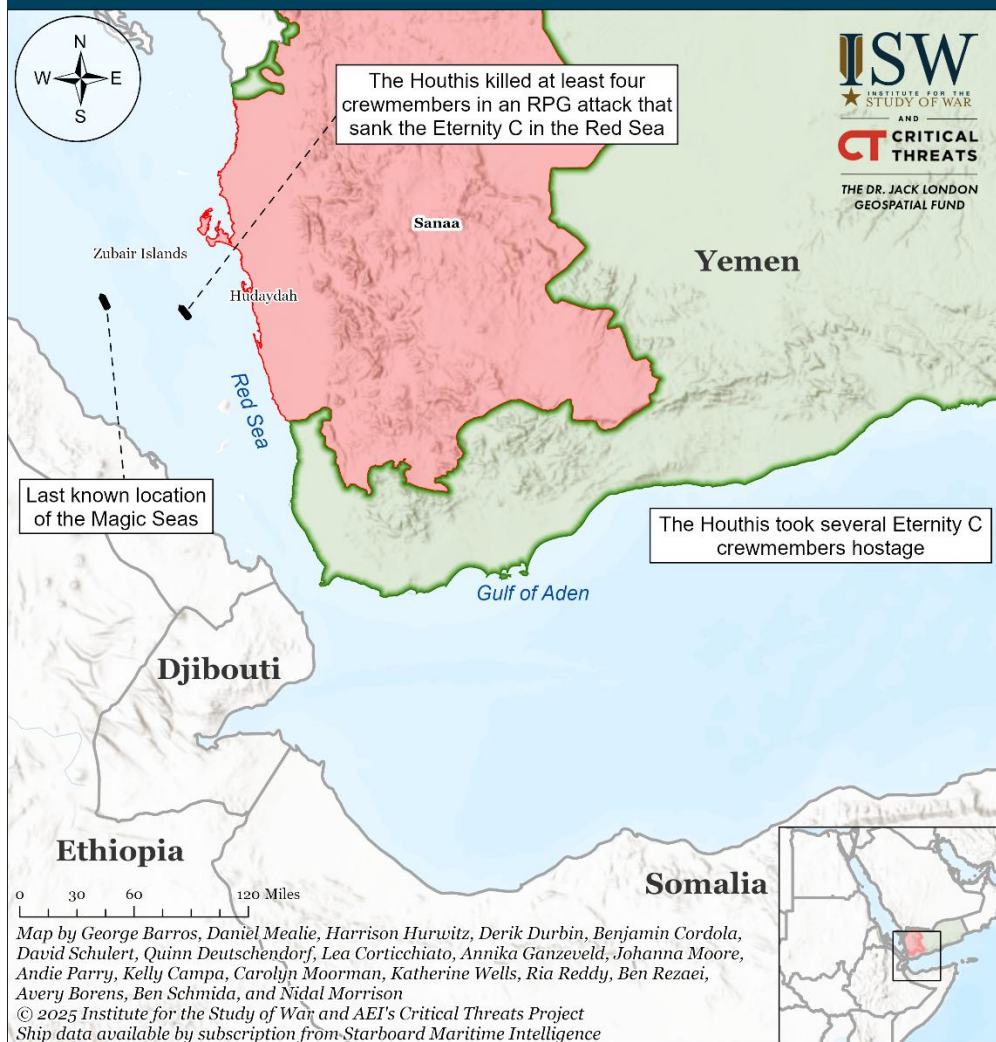
British Foreign Secretary David Lammy warned on July 8 that the E3 (the United Kingdom, France, and Germany) could trigger the snapback mechanism if Iran does not cooperate on its nuclear program.^[11] Lammy emphasized that Iran needs to "step back" from its "nuclear ambitions," including by resuming IAEA inspections, to avoid snapback sanctions.^[12] The Joint Comprehensive Plan of Action (JCPOA) snapback mechanism allows JCPOA signatories to reimpose UN Security Council sanctions on Iran in the event of "significant non-performance by Iran

of JCPOA commitments.”^[13] The snapback mechanism would reimpose six United Nations Security Council (UNSC) resolutions on Iran, including bans on the transfer of conventional arms to and from Iran, international support for Iran's missile program, enrichment-related activities, and the testing and development of nuclear-capable missiles.^[14] The snapback mechanism expires in October 2025, after which the UN sanctions cannot be reinstated. The process of triggering the snapback mechanism and completing the UN Security Council can take up to 30 days, which means the E3 would need to start the process well in advance of the deadline. The sanctions, if imposed, would remain in place even after the deadline. These sanctions would increase economic pressure on Iran as it seeks to rebuild its military and economic infrastructure following the Israel-Iran war.

The Houthis killed at least four crew members and took up to 21 crew members hostage, probably as part of an effort to deter shipping companies from sailing to Israeli ports.^[15] The Houthis confirmed on July 9 that they conducted a July 7 attack that sank the Liberian-flagged, Greek-operated *Eternity C*. The Houthis deployed multiple small craft carrying armed personnel, who fired at least five rocket-propelled grenades targeting *Eternity C* before boarding.^[16] The damage from the explosions sank the vessel. The Houthis killed four out of 22 to 25 crew members (21 Filipinos and one Russian) aboard the *Eternity C* and took roughly 12 crew members hostage. European vessels operating under the EU mission to protect shipping in the Red Sea rescued six other crew members.

The Houthis appear to have adopted hostage-taking to discourage international shipping companies from shipping goods to Israel. The effort to discourage shipping companies from shipping to Israel is part of a long Houthi campaign to “blockade” Israel and impose economic costs for Israel’s operations in the Gaza Strip. The Houthis have not taken any hostages from ship crews since November 2023, when they initially took 20 crew members from the *Galaxy Leader*.^[17] The Houthis have targeted two vessels (the *Magic Seas* on July 6 and the *Eternity C* on July 7) in recent days and have either tried to take or have taken hostages from the vessels.^[18] Both ships sailed on behalf of companies that also send ships to Israeli ports, though neither ship was itself bound for an Israeli port.^[19] The Houthis said that they targeted the *Eternity C* because some ships owned by its parent company docked at Israeli ports.^[20] This suggests that the Houthis are attempting to discourage shipping companies from traveling to Israeli ports by attacking their vessels regardless of destination. This tactic will have the added effect of driving up shipping costs in the Red Sea for all shippers, regardless of port of destination. Shipping prices have still not fallen to their pre-October 7 rates, and this hostage-taking will only exacerbate the issue.^[21]

Houthi Attacks on Vessels in the Red Sea, July 9, 2025

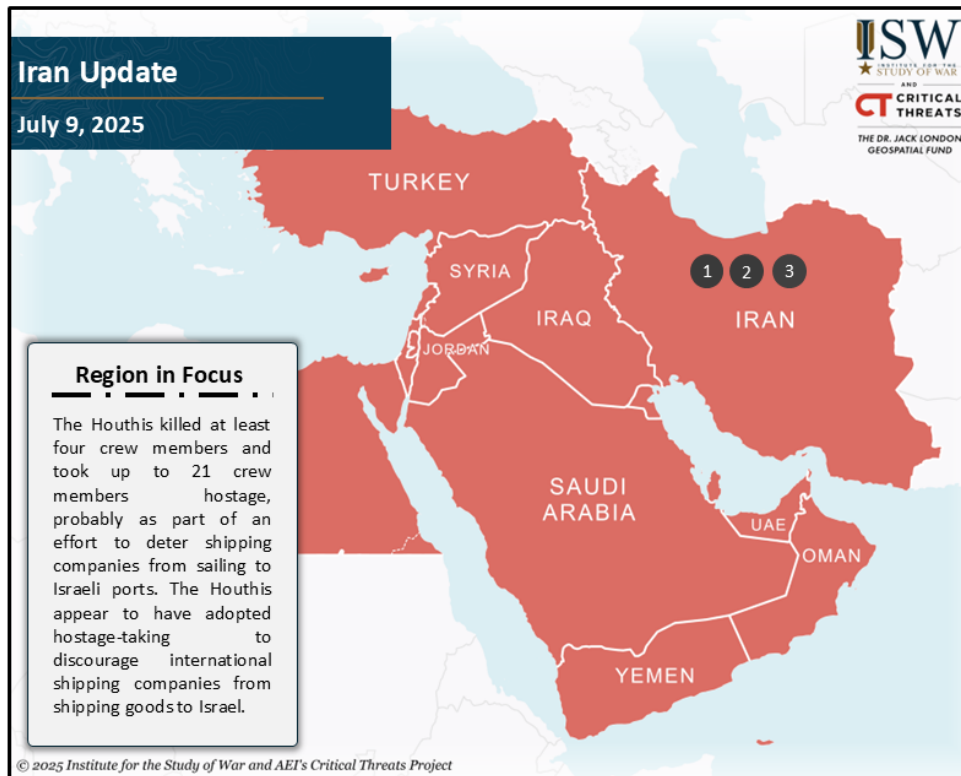


Key Takeaways

- **Nuclear Negotiations:** Russia offered to help replenish Iran's depleted uranium stockpile to support a peaceful nuclear program. Russia's involvement in the US-Iran nuclear talks would be very unlikely to secure US interests due to Russia's alignment with Iran.
- **Iran's Nuclear Program:** French intelligence assesses that Iran's nuclear program is very seriously damaged and its weaponization timeline is extremely delayed, which is consistent with previous reports.
- **Snapback Sanctions:** British Foreign Secretary David Lammy warned on July 8 that the E3 (the United Kingdom, France, and Germany) could trigger the snapback mechanism if Iran does

not cooperate on its nuclear program. Lammy emphasized that Iran needs to "step back" from its "nuclear ambitions," including by resuming IAEA inspections, to avoid snapback sanctions.

- **Red Sea:** The Houthis killed at least four crew members and took up to 21 crew members hostage, probably as part of an effort to deter shipping companies from sailing to Israeli ports. The Houthis appear to have adopted hostage-taking to discourage international shipping companies from shipping goods to Israel. The effort to discourage shipping companies from shipping to Israel is part of a long Houthi campaign to “blockade” Israel and impose economic costs for Israel’s operations in the Gaza Strip.



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- 3 **TEHRAN, IRAN.** The British foreign secretary warned that the E3 could trigger the snapback mechanism if Iran does not cooperate on its nuclear program.

The United States sanctioned 22 Iran's Islamic Revolutionary Guard Corps (IRGC)-linked entities and removed several Iran-related sanctions from shipping companies and vessels on July 9.^[22] The US Treasury sanctioned 22 entities for their connections to the IRGC and its Quds Force. 18 of the 22 sanctioned entities are Hong Kong-based trading companies founded between 2019 and 2023. The US Treasury also sanctioned two Turkish companies, along with Dubai-based Bright Spot Goods Wholesalers LLC, for their ties to the IRGC. The US Treasury imposed additional sanctions on Hong Kong's Enka Trading Limited's sanctioned status to account for its links to the IRGC-QF. The United States previously sanctioned Enka Trading Limited in 2024 because it worked in the Russian economy's technology sector.^[23]

The US Treasury also removed several Iran-related entities from its designated sanctions list, including UAE-based company Swedish Management Co Sa and six vessels previously linked to Swedish Management. The US Treasury removed the vessel Xuan Ning, which had been connected to Shanghai Xuanrun Shipping Company Limited. The US Treasury sanctioned these entities in 2023 for aiding the Iranian oil trade.^[24] It remains unclear why these entities were removed from the list.

The IRGC Ground Forces Quds Operational Base claimed on July 9 that its security forces killed six fighters and arrested others in Chabahar, Sistan and Baluchistan Province.^[25] Security forces also reportedly seized light and heavy weapons and large quantities of explosives. The IRGC claimed that the individuals had planned attacks that would target crowded areas.^[26] The detainees may be Jaish al Adl fighters active in southeastern Iran. Jaish al Adl is a Baloch, Salafi-jihadi militant group that frequently attacks Iranian security forces in this region. The Iranian regime has previously accused Israel of supporting Jaish al Adl.^[27] The IRGC may use these arrests as part of a broader justification to expand security operations and crack down on dissent in southeastern Iran. The Quds Operational Base previously announced on July 1 that security forces arrested over 50 individuals “linked to Israel” and killed two others in Sistan and Baluchistan Province.^[28] The July 1 “arrests” are unlikely to be part of an effective counterintelligence campaign. The July 1 arrests instead appear to be part of the broader Iranian crackdown that has targeted minority groups for perceived disloyalty.

Iranian Armed Forces General Staff (AFGS) Chief Major General Abdol Rahim Mousavi met with Law Enforcement Command (LEC) Commander Brigadier General Ahmad Reza Radan on July 9 to discuss the regime's stability.^[29] Mousavi praised the LEC's “effective presence” during the 12-day Israel-Iran war and highlighted its coordination with military and security institutions to counter “hybrid warfare and preserve domestic order.”^[30] The regime defines hybrid warfare as the use of all domains of power—including information, electronic, cultural, social, terrorist, and military operations—by hostile actors.^[31] Radan also discussed the dismantlement of Israeli- and US-linked spy networks and emphasized the need to stay agile to counter modern threats.^[32] Both the AFGS and the LEC have historically participated in developing domestic surveillance and censorship infrastructure. The AFGS previously supported the development of state-approved messaging platforms in 2020 to replace foreign apps and expand regime surveillance and censorship.^[33] The LEC created a Cyber Police division in 2011, and the IRGC trained cyber units to monitor dissent and spread pro-regime narratives. ^[34]Mousavi and Radan's meeting is consistent with the Iranian regime's broader effort to strengthen internal control and expand securitization measures.^[35] CTP-ISW previously assessed that Iran is prioritizing regime stability and deepening its securitization policies

after the war. The Iranian Parliament approved a nine-article law on June 29, criminalizing any cooperation with hostile actors as “corruption on earth,” which is a charge punishable by death.[36]

Over 100 prominent Qom clerics stated on July 9 that they declared loyalty to Iranian Supreme Leader Ali Khamenei, likely in response to efforts to sideline him amid his prolonged absence from public view.[37] The clerics described Iran’s retaliatory strikes on Israel as a “historic victory” under Khamenei’s leadership and praised him as the “divine pillar” of the Islamic Republic.[38] They also warned that any “insult or attack” on Khamenei would provoke a severe response.[39] Prominent cleric Ayatollah Naser Makarem Shirazi on June 29 previously declared that individuals who threaten Khamenei or religious authority are “mohareb” (enemies of God) and therefore subject to the death penalty.[40] The statement likely highlights growing efforts by Iranian hardliners to consolidate support for Khamenei amid signs of internal factional tension and attempts by other political actors to sideline Khamenei or regain influence for moderate politicians. Unspecified Iranian leaders reportedly developed a contingency plan during the Israel-Iran War to govern Iran without Khamenei if he is killed or informally sidelined.[41] They considered forming a leadership committee to replace him and negotiate a ceasefire with the United States and Israel.[42] Former President Hassan Rouhani separately lobbied senior clerics in Qom during the war, including Makarem Shirazi, to pressure Khamenei to accept a ceasefire and drop Iran’s demand for uranium enrichment on Iranian soil.[43]

Syria

The Syrian transitional government met with the Syrian Democratic Forces (SDF) and Kurdish officials on July 9 to discuss the implementation of the March 10 SDF-Syrian government agreement.[44] **Both groups remain committed to the broad outline of the agreement, though neither side has changed its position on key outstanding issues.** UK-based, Qatari-owned media reported that Syrian President Ahmed al Shara, US Special Envoy to Syria Thomas Barrack, and SDF Commander Mazloum Abdi met in Damascus on July 9.[45] Several Syrian sources reported that Shara did not attend the meeting between Barrack and Abdi, however.[46] The SDF and Syrian government agreed to a ceasefire and political agreement on March 10 that included the integration of the SDF’s military and civil organizations into the Syrian government and the handover of SDF-controlled sites in northeastern Syria to the government.[47] Barrack and Abdi reportedly discussed the implementation of the March 10 agreement.[48] Senior Syrian, French, US, Syrian Democratic Council (SDC), and Autonomous Administration of North and East Syria (AANES) officials separately met in Damascus on July 9 to discuss the March 10 agreement.[49] The officials reportedly discussed Syria’s governing structure, the relationship between the AANES and the interim government, the economy, integration of AANES institutions, and military capabilities.[50] AANES co-chair Foza Youssef told Kurdish media that the meeting was positive, and negotiations will continue “at a later stage.”[51]

Barrack told Western media that the Syrian government and the SDF “remain at odds” following the meetings in Damascus.[52] Barrack noted following his meeting with Shara and Abdi that the SDF has been “slow” to “negotiate and accept” a deal with Damascus and that “federalism does not work” in Syria.[53] Barrack’s comments about federalism could be read as a repudiation of a key SDF demand surrounding the form of government in Syria, which they have variously referred to as “federalism” and

”decentralization,” among other terms.[54] The Syrian government continues to maintain that federalism is unacceptable.[55] Syrian media reported on July 8 that the SDF may propose extending the implementation timeline beyond 2025 and addressing unspecified “Kurdish demands.”[56] Both the SDF and the Syrian government have taken several concrete steps to implement the March 10 agreement, including the creation of a deconfliction zone near Tishreen Dam and the integration of two historically Kurdish and SDF-controlled neighborhoods into Aleppo City’s governance.[57] Neither the Syrian transitional government nor the Kurds have adjusted their long-held positions on Syria’s governing structure or the integration of the SDF into the Syrian military apparatus since March 10, despite the early steps toward integration that both sides have taken.[58] Both sides remain committed to the agreement amid these outstanding issues that the March 10 agreement did not resolve.[59]

The Syrian transitional government has continued to meet with US officials, potentially to seek further US assistance. Syrian President Ahmed al Shara and Syrian Foreign Minister Asaad al Shaibani met with US Special Envoy to Syria Thomas Barrack in Damascus on July 9.[60] Shara, Shaibani, and Barrack reportedly discussed prospects for US-Syrian cooperation and political dialogue between the two countries.[61] Shara, Shaibani, and Barrack’s meeting follows a call between Shaibani and US Secretary of State Marco Rubio on July 3.[62] Rubio and Shaibani announced that the United States and Syria would establish a special committee focused on the chemical weapons issue in Syria.[63] Rubio confirmed that the Trump Administration is working with Congress to repeal the Caesar Act in the coming months.[64] Rubio also said that the United States is interested in reopening its embassy in Damascus and extended an official invitation to Shaibani to visit Washington “as soon as possible.”[65] Shaibani and Rubio’s discussion topics align with the United States’ “expectations” for Shara to act upon following the US decision to lift sanctions on Syria, which include curbing Palestinian militant activity in Syria, preventing an ISIS resurgence, and taking steps towards an eventual entry into the Abraham Accords.[66]

Two Islamic State of Iraq and Syria (ISIS)-linked fighters attacked a Syrian government checkpoint in Idlib on July 8.[67] Syrian Ministry of Defense (MoD) and the General Security Service (GSS) personnel attempted to stop a vehicle suspected of carrying weapons on the Idlib-Binnish road.[68] The two “ISIS-linked” fighters refused to stop their vehicle and fired on security personnel, injuring one MoD member.[69] Members of the security services killed one ISIS fighter and arrested the other.[70] The security services captured a large quantity of anti-tank missiles in the vehicle that the two ISIS fighters were attempting to move.[71] This is the first engagement between government forces and ISIS in Idlib Province since the fall of the Assad regime in December 2024. The United States recently conducted a drone strike that killed an ISIS member in Idlib Province on June 10, however.[72] ISIS historically maintained a presence in Idlib Province before the Assad regime fell, and Uzbek fighters in northwestern Syria had contact with IS Khorasan Province (IS-KP).[73] ISIS often clashed with Hay’at Tahrir al Sham (HTS) and planned external operations there.[74]

Saraya Ansar al Sunnah, a Salafi-jihadi group ideologically aligned with ISIS, claimed responsibility for fires in Latakia to instill fear within the local Alawite community.[75] It is not clear if the group set the fires themselves, however. Destructive fires have afflicted Latakia Province since June 30.[76] The group claimed on July 3 that it set fire to the Qastal forest with

the intent to displace and kill local Alawites.[77] Saraya Ansar al Sunnah justified the alleged arson attack as retaliation for the Assad regime's destruction of over \$250 million in Idlib farmland between 2019 and 2025.[78] CTP-ISW cannot verify Saraya Ansar al Sunnah's involvement in setting the Latakia fires. The Syrian Ministry of Emergency and Disaster Management blamed the fires on dry winds, higher-than-average temperatures, and the presence of unexploded ordnance from the civil war.[79] The temperature has been in the mid- to high-80s Fahrenheit in Latakia since July 1, and it has not rained.[80] Syrian Interior Ministry spokesperson Nouredine al Baba said the ministry is investigating whether the wildfires were manmade and that several arson suspects have been arrested, but that there is no conclusive evidence of arson as of July 8.[81]

Saraya Ansar al Sunnah is likely capitalizing upon the fires as an opportunity through which to instill fear in the coastal Alawite community, regardless of whether the group is responsible for the fires. Saraya Ansar al Sunnah's claim of responsibility for the Latakia fires also follows a litany of false accusations or attributions of blame for the fires online. [82] Saraya Ansar al Sunnah has claimed to have conducted arson attacks previously, however. The group claimed that it set forest fires that it claimed targeted Alawites in Qardaha, Latakia Province, in early March, and recently claimed to conduct arson attacks in Aleppo and Hama provinces in June.[83]

The Palestinian Territories and Lebanon

Hezbollah Secretary General Naim Qassem stated that Hezbollah's loss of Iranian supply routes through Syria has reduced Iranian military support to Hezbollah.[84] This acknowledgement has likely prompted Hezbollah to conduct a review of its strategy in Lebanon, as recently reported by Reuters.[85] Qassem told Hezbollah-aligned media on July 8 that the Assad regime's collapse was a loss for the "entire" Axis of Resistance because Iran used Syria to provide Hezbollah with military support.[86] Qassem's comment is notable in that Qassem previously referred to the disruption to Iranian supply routes through Syria as a "small detail" that "may change with time" in December 2024.[87] Qassem's public recognition of Hezbollah's permanent loss of the Iranian overland corridor likely reflects internal Hezbollah discussions about its ability to resupply its stockpiles and reconstitute its forces. Hezbollah has attempted to smuggle weapons into Lebanon since the fall of the regime, but the Syrian government has intercepted a number of these shipments, and the number of weapons that make it to Hezbollah is probably a minor fraction of the amount Hezbollah received prior to December 2024.[88] The realization that the Iranian ground routes to Hezbollah have been severely and permanently disrupted with the establishment of an anti-Iranian Syrian government has likely led Hezbollah to begin rethinking its strategy in Lebanon. Three unspecified sources told Reuters on July 4 that Hezbollah has begun a review of its strategy in Lebanon.[89] This re-think is probably driven by Hezbollah's losses in the October 7 War and regional changes since October 7, including the collapse of Syria, and does not represent a fundamental change in Hezbollah's strategic aims.[90]



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Iran Update



Iran Update, July 10, 2025

Ben Rezaei, Nidal Morrison, Avery Borens, Katherine Wells, Ben Schmida, Ria Reddy, and Brian Carter

Information Cutoff: 2:00 PM ET

A senior Israeli official told Western media on July 10 that Iran did not move its enriched uranium stockpile from the Fordow, Natanz, or Esfahan nuclear sites ahead of the US and Israeli strikes on the sites.^[1] The official told Reuters that Iran has not moved the material since the strikes either.^[2] Israeli sources stated on June 25 that US and Israeli strikes buried Iran's enriched uranium stockpile under rubble.^[3] Israeli strikes on June 13 damaged the Fuel Plate Manufacturing Plant (FPFP) at the Esfahan Nuclear Technology Center, which stored approximately 85 percent of Iran's 20 percent enriched uranium stockpile and 83 percent of Iran's 60 percent enriched uranium stockpile as of August 2023.^[4] It is unclear how much, if any, of Iran's enriched uranium stockpile was at FPFP at the time of US and Israeli strikes. Reuters reported that Iran could gain access to the Esfahan site, but that it will be difficult to remove any of the material stored at the site, according to the senior Israeli official.^[5] The *New York Times* similarly reported on July 10 that the storage facility at the Esfahan site was too deep to be effectively destroyed, but US and Israeli strikes made it significantly harder to access the material by targeting tunnel entrances, according to a senior Israeli official.^[6] Uranium is an element, which means that you cannot destroy it with conventional weapons, only scatter it or pulverize it into dust. The Israeli official said that Israel believes Iran stored additional stockpiles at Fordow and Natanz but that these will be too difficult to recover following US and Israeli strikes.^[7] The US and Israeli strikes on Fordow and other enrichment facilities could have buried enriched uranium underground to limit access to it. Iranian President Masoud Pezeshkian stated that Iran cannot access certain key nuclear facilities to accurately assess the damage.^[8] Iran's enriched uranium stockpile is effectively inaccessible, assuming that Iran did not move the material and cannot access the facilities it is stored. Senior Israeli intelligence officials said that any Iranian attempts to recover the material would "almost certainly" be detected.^[9]

Iranian reformists and hardliners are in disagreement over Iran's policy on nuclear negotiations and US-Iran relations following the 12-day Israel-Iran War. Reformist newspaper *Ham Mihan* published an editorial on July 9 and warned that public threats against foreign leaders, including US President Donald Trump, risk provoking US retaliation.^[10] The outlet explicitly addressed Iranian Judiciary Chief Gholam Hossein Mohseni Ejei and criticized judicial "double standards" for prosecuting "minor dissent" while ignoring calls to assassinate Trump.^[11] The outlet also cited Trump's 2023 assassination attempt and warned that similar incidents could justify US retaliation "regardless of Iranian denials."^[12]

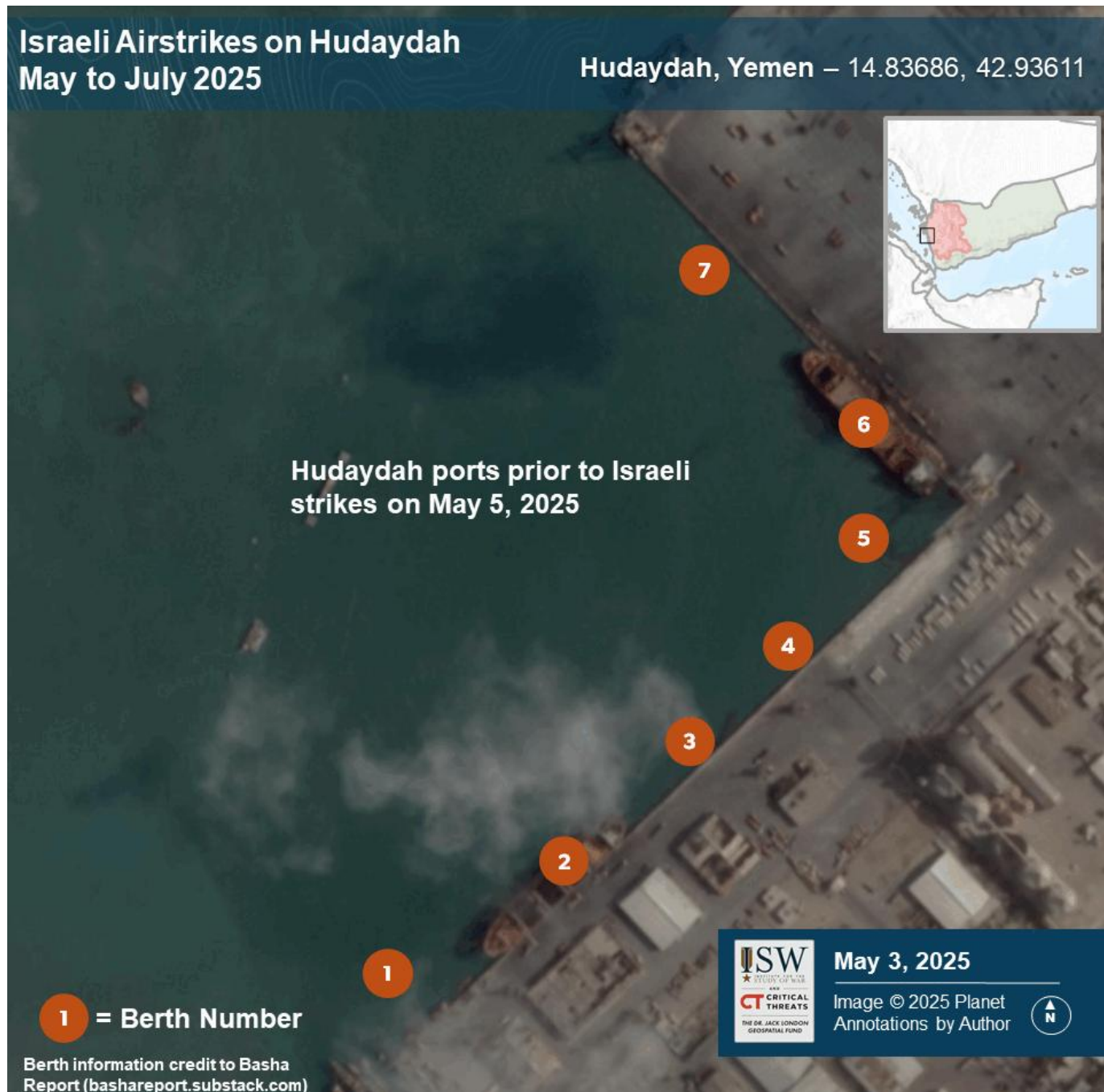
These reformists' comments come after senior Iranian clerics issued a fatwa on June 30 that declared Trump and Israeli Prime Minister Benjamin Netanyahu “mohareb” (enemies of God) and called for their killing.[13] Some clerics and organizations even offered monetary rewards and solicited public donations for the assassinations.[14] Assembly of Experts member Mohsen Araki defended the fatwa and stated that threats to Khamenei amount to “war against the Islamic world” and similarly labeled US and Israeli leaders as “mohareb.”[15] Twenty-four Iranian parliamentarians, including ultraconservative Paydari (Stability) Front members, criticized President Masoud Pezeshkian’s interview with Tucker Carlson on July 6 and accused him of undermining national unity in a July 10 letter.[16] They also criticized Pezeshkian for failing to endorse recent clerical fatwas against Trump and Netanyahu.[17]

The post-war environment has demonstrated Iran’s internal divisions as hardliners and media linked to the military rejected nuclear talks while moderates pushed for de-escalation with the United States. The Iranian parliamentarians criticized Pezeshkian’s call for renewed talks with the United States and resuming cooperation with the IAEA as “disappointing.”[18] They warned that expressing willingness to negotiate sends a “message of weakness” to the United States, which could “embolden the US to impose more sanctions or launch another military strike.”[19] Iranian Armed Forces General Staff-affiliated media separately outlined preconditions on July 10 that amount to a rejection of renewed US-Iran talks.[20] The preconditions include recognition of Israeli aggression, investigation of US involvement, payment of war reparations, and binding security guarantees to prevent future attacks.[21] The outlet warned that talks without these demands would “legitimize past attacks” and encourage future ones.[22] Hardliners are effectively rejecting negotiations unless they occur on a maximalist basis that addresses Iranian demands in full. The United States has shown absolutely no inclination towards addressing any maximalist Iranian demands, especially these preconditions that go far beyond previous negotiation frameworks. Hardliner demands contrast with efforts by moderate figures, including former President Hassan Rouhani, to push for de-escalation.[23] Rouhani has lobbied senior clerics in Qom to pressure Khamenei into accepting a ceasefire and halting uranium enrichment, framing these moves as necessary to “save the Islamic system from collapse.”[24]

Israeli airstrikes targeting Houthi-controlled Hudaydah Port since May 2025 have rendered several berths at the port inoperable. Satellite imagery also demonstrates that the Houthis have only a limited ability to repair the damage that the berths have sustained. Israeli airstrikes since May 2025 have badly damaged six of Hudaydah port’s seven main berths. Berth seven has not been regularly used since before the strikes began on May 5, according to Starboard Maritime Intelligence, indicating that Israeli airstrikes destroyed it.[25] Satellite imagery shows that the most recent strike on July 6 was the most destructive, causing significant damage to berths two, three, and four, as well as additional damage between berths six and seven. The July 6 damage to berths two, three, and four appears to be more significant than the damage that berth seven suffered in early May.

The Houthis repaired some earlier damage to the port facilities in June during a lull in Israeli strikes, but did not repair the more significant damage to berths one, five, and seven. The Houthis were unable to repair some of the more significant damage within the two months between May and July 2025. The Houthis would presumably repair these facilities if they could do so rapidly. The Houthi inability to

repair the berths between May and July does not, on its own, indicate that the berths are permanently destroyed.



Note: Berth locations are approximate.

The combination of Israeli operations against Iranian military leadership and an Israeli strike targeting a senior Iranian-backed Iraqi militia commander on the Iraq-Iran border may have created shock among Iranian-backed Iraqi militias that disrupted their plans to attack US forces in Iraq. An Israeli airstrike killed a senior member of Iranian-backed

Iraq militia Kataib Sayyid al Shuhada (KSS) on the Iran-Iraq border on June 21.[26] The senior militiaman was on the border while KSS had already planned to transfer weapons, including drones, from Iran to Iraq to attack US forces.[27] A Kurdish journalist close to the Iraqi Kurdistan Democratic Party (KDP) said on June 28 that the strike caused militia commanders to “panic” and cancel pre-planned attacks on US forces.[28] This “panic” suggests that the methodical Israeli campaign that killed many top Iranian military commanders, combined with the death of the senior KSS member on a presumably confidential mission, created shock within the militia ranks and caused them to cancel the attacks.

KSS leader Abu Alaa al Walai had previously threatened on June 11 to attack US forces if the United States participated in the Israeli air campaign.[29] Several Iranian-backed Iraqi militias, including KSS, announced on June 17 that they had developed a “joint plan” to target US forces if the United States joined the Israeli air campaign against Iran.[30]

The plans to attack US forces, which would presumably have been previously communicated to militia attack cells, probably contributed to unclaimed but likely Iranian-backed Iraqi militia attacks targeting US forces in Iraq since June 12. Militia commanders would have needed to communicate basic attack plans to their cells throughout Iraq and provide them with weapons to conduct the attacks. Likely Iranian-backed Iraqi militias conducted multiple one-way drone attacks targeting US positions across Iraq between June 12 and 24.[31] The militias may have suffered from a lack of discipline among the rank-and-file fighters who attempted to independently launch drone attacks targeting US forces in Iraq. Mid-level militia leadership may have also allowed fighters to conduct attacks without publicly sanctioning them.

Key Takeaways

- **Iranian Nuclear Program:** A senior Israeli official told Western media on July 10 that Iran did not move its enriched uranium stockpile from the Fordow, Natanz, or Esfahan nuclear sites ahead of the US and Israeli strikes on the sites. Iran's enriched uranium stockpile is effectively inaccessible, assuming that Iran did not move the material and cannot access the facilities it is stored.
- **Iranian Domestic Politics:** The post-war environment in Iran has demonstrated Iran's internal divisions as hardliners and media linked to the military rejected nuclear talks while moderates pushed for de-escalation with the United States.
- **Yemen:** Israeli airstrikes targeting Houthi-controlled Hudaydah Port since May 2025 have rendered several berths at the port inoperable. Satellite imagery also demonstrates that the Houthis have only a limited ability to repair the damage that the berths have sustained.
- **Iraq:** The combination of Israeli operations against Iranian military leadership and an Israeli strike targeting a senior Iranian-backed Iraqi militia commander on the Iraq-Iran border may have created shock among Iranian-backed Iraqi militias that disrupted their plans to attack US forces in Iraq.

Iran

See topline section.

Iraq

See topline section.

Yemen

Satellite imagery from July 9 shows oil slicks coming from *Eternity C*, the cargo vessel that the Houthis struck with rocket-propelled grenades and attempted to hijack on July 7.[32] The Houthis published footage of the *Eternity C* sinking on July 9.[33] Oil spills pose severe environmental consequences as well as disrupt vessels transiting through the Red Sea and the Gulf of Aden. Houthi officials, including the Supreme Leader Abdulmalik al Houthi, vowed on July 9 to continue to target vessels with links to Israel to deter shipping companies from docking at Israeli ports as part of their broader effort to deter Israel from its campaign against Hamas in the Gaza Strip.[34] The EU mission to defend against Houthi attacks, Operation Aspides, reported on July 10 that it rescued four additional crew members from *Eternity C* overnight, bringing the total number of rescued to 10 out of 25 crew members and security personnel.[35] The status of the remaining crew members remains unclear. The Houthis announced on July 9 that they had taken crewmembers from *Eternity C* as hostages.[36]

The Houthis launched a ballistic missile targeting Ben Gurion Airport in central Israel on July 9.[37] The Israel Defense Forces (IDF) issued an alert across Israel due to a projectile from Yemen.[38] The Houthis have launched hundreds of drones and ballistic missiles targeting Israel since the Houthis began their campaign to enforce an economic blockade on Israel in November 2023.[39]

Syria

The Syrian Democratic Forces (SDF) units, supported by US forces, arrested two Islamic State of Iraq and Syria (ISIS) leaders in al Hol Camp, Hasakah Province, on July 8.[40] The SDF told Kurdish media that the SDF arrested the head military emir and head religious emir of al Hol camp.[41] The SDF claimed the military emir planned military operations in the camp and coordinated weapons and people smuggling to and from the camp.[42] The SDF claimed that the ISIS religious emir was responsible for recruiting children and teaching "sharia lessons" to indoctrinate children in the camp.[43] The SDF seized three cellphones allegedly used by ISIS leaders to contact ISIS members in Syrian territory controlled by the Turkish-backed Syrian National Army (SNA), though the phones could also be used to contact ISIS forces in other areas.[44] Al Hol camp houses an estimated 37,000 people, and the majority of the camp's inhabitants are the family members of ISIS fighters.[45]

The Palestinian Territories and Lebanon

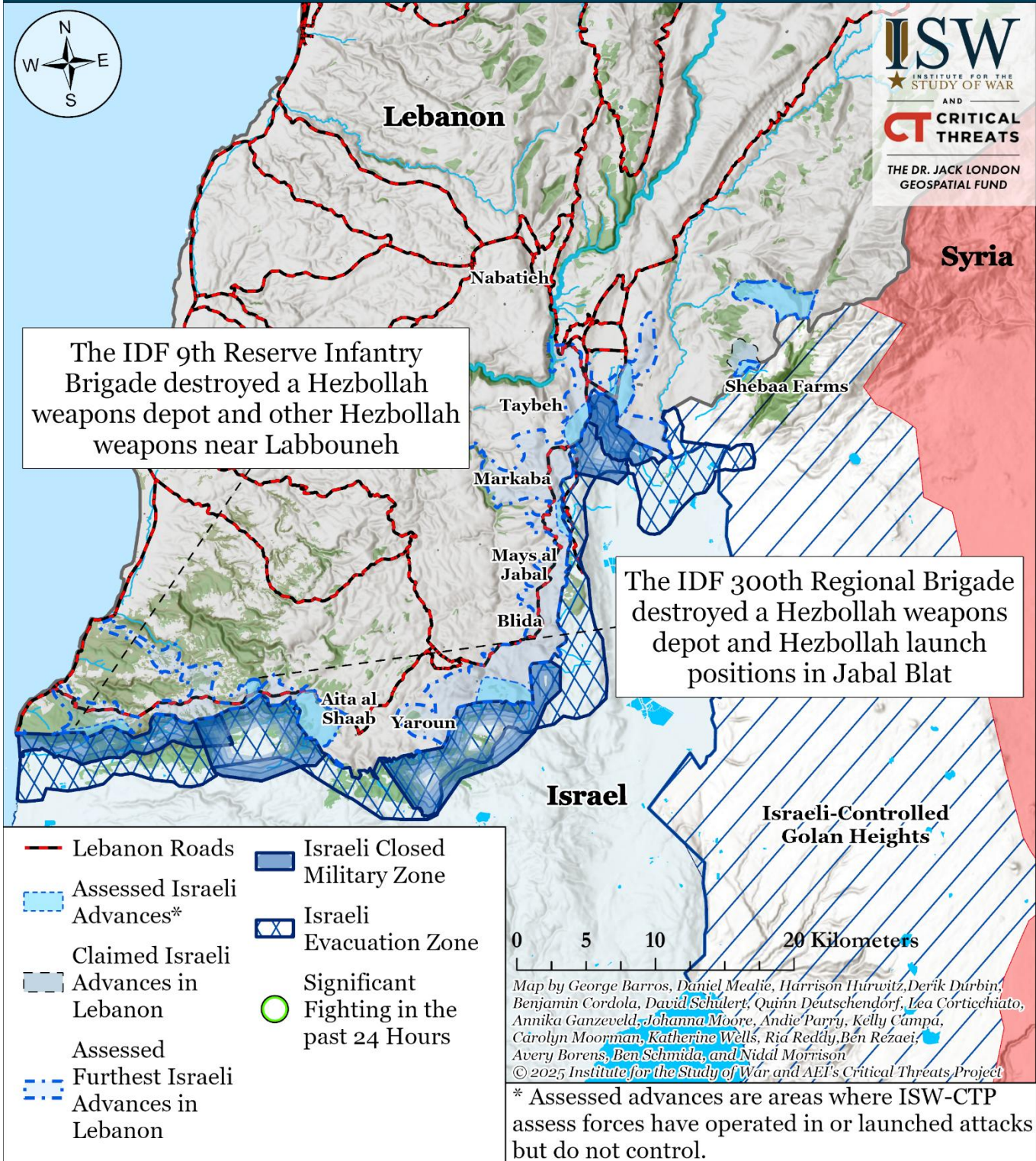
The Israel Defense Forces (IDF) ground troops destroyed Hezbollah weapons depots in southern Lebanon as part of the Israeli effort to destroy Hezbollah infrastructure and prevent Hezbollah's reconstitution.[46] The IDF 300th Regional Brigade raided and demolished a Hezbollah compound in Jabal Blat, Tyre District, that contained a weapons depot and launch positions.[47] The IDF 9th Reserve Infantry Brigade destroyed a Hezbollah weapons depot and other Hezbollah weapons near Labbouneh, Tyre District.[48] Both Jabal Blat and Labbouneh are directly across the border from Israel. The IDF destroyed multiple rocket launchers, a machine gun, and

”dozens” of explosive devices.[49] Israeli media reported that the IDF operations were a rare instance in which Israeli troops operated beyond Israel’s five permanent positions in southern Lebanon.[50] Hezbollah-aligned media reported on July 9 that Israel’s announcement was a “deliberate exaggeration,” noting that Israel’s ground operations are a “continuation of an aggression that has not stopped.”[51]

Hezbollah Secretary General Naim Qassem said on July 8 that “we must... implement the Taif Agreement.”[52] The Taif Agreement, which Lebanese parliamentarians signed in 1989, aimed to reform Lebanon’s political system and disarm all Lebanese militias except Hezbollah.[53] The Taif Agreement states that Lebanon would be “taking all the steps necessary to liberate all Lebanese territories from [Israel], to spread state sovereignty over all the territories.”[54] Hezbollah has long used continued Israeli operations and the Taif Agreement to justify retaining its weapons.[55] Qassem’s statements indicate that Hezbollah will likely continue to use Israeli operations and the Taif Agreement as justification to reject continued calls for disarmament.[56] It also suggests that Qassem may seek government support against Israel, given the agreement’s reference to the “necessary” steps to “liberate all Lebanese territories” from Israel.[57] This includes the Israeli-controlled Shebaa Farms, in Hezbollah’s view.[58]

Reported Israeli Operations in Lebanon

As of July 10, 2025 at 2:00 PM EST



The Critical Threats Project (CTP) at the American Enterprise Institute and the Institute for the Study of War (ISW) publish the Iran Update, which provides insights into Iranian and Iranian-sponsored activities that undermine regional stability and threaten US forces and interests. CTP-ISW publishes the Iran Update daily.

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Iran Update



**Ben Rezaei, Ria Reddy, Carolyn Moorman, Avery Borens,
Johanna Moore, and Annika Ganzeveld**

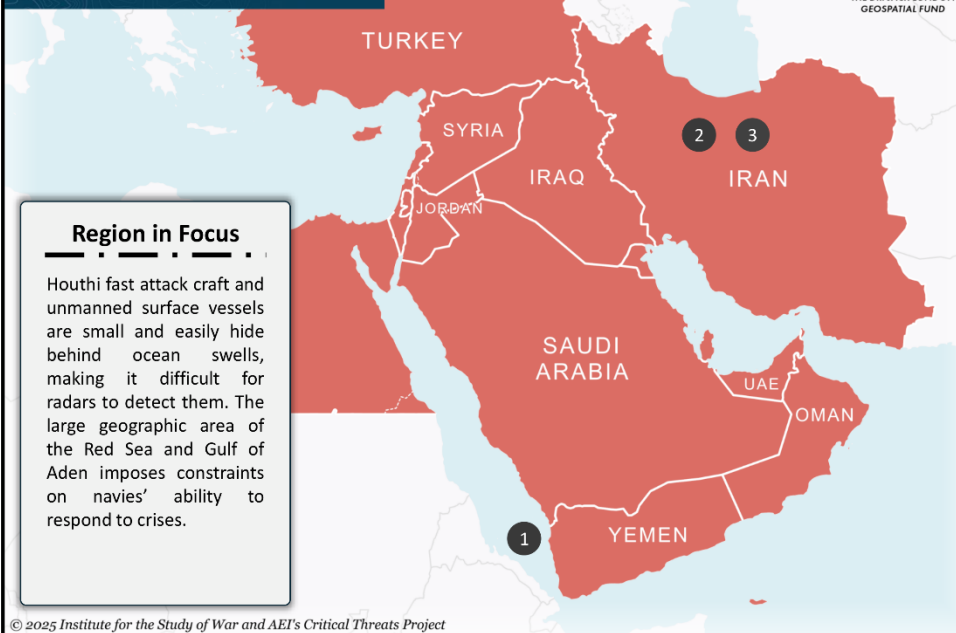
July 11, 2025 Information Cutoff: 2:00 PM ET

The operator of the Liberian-flagged *Eternity C* told the *Wall Street Journal* on July 10 that the British Navy and the European Union (EU) naval task force did not have ships near the *Eternity C* to protect it from a Houthi attack on July 7.[1] The Houthis have conducted two complex attacks on vessels transiting the Red Sea in recent days, sinking both ships. The Houthis attacked the *Magic Seas* and *Eternity C* on July 6 and 7, respectively, using small arms, rocket-propelled grenades, and unmanned surface vessels.[2] The Houthis reportedly also used anti-ship missiles to attack the *Eternity C*. [3] The Houthis launched the small arms, rocket-propelled grenades, and unmanned surface vessels from small attack craft. Ocean swells can hide small attack craft on radars, making them difficult to detect. The large geographic area of the Red Sea and Gulf of Aden that the British Navy and the EU naval task force patrol imposes constraints on the navies' ability to respond to crises. A senior US official told the *Wall Street Journal* on July 10 that international efforts to protect shipping in the Red Sea have become "less robust" as fewer navies conducting patrols in the Red Sea and Gulf of Aden have the capabilities to counter Houthi attacks.[4]

Former Iranian Prime Minister and a key leader of the 2009 Green Movement, Mir Hossein Mousavi, called on July 11 for a referendum to establish a constitutional assembly in Iran.[5] Mousavi framed a referendum as the only way to "save" Iran and warned that public solidarity during the Israel-Iran War should not be mistaken for "approval of the government." [6] Mousavi described the war as "the bitter result of a series of grave errors" and said that the current governance system does not represent all Iranians, echoing his February 2023 demand for a referendum and new constitution.[7] Mousavi called for a referendum in February 2023 on whether to maintain the Islamic Republic and proposed drafting a new constitution.[8] Iranian Supreme Leader Ali Khamenei rejected calls for a referendum in April 2023, likely in response to Mousavi and other reformist officials' calls for a referendum.[9] Khamenei warned that such calls risked "polarization and instability." [10]

Iran Update

July 11, 2025



Region in Focus

Houthi fast attack craft and unmanned surface vessels are small and easily hide behind ocean swells, making it difficult for radars to detect them. The large geographic area of the Red Sea and Gulf of Aden imposes constraints on navies' ability to respond to crises.

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- 1 RED SEA.** The British Navy and the European Union (EU) naval task force were unable to protect two merchant vessels from recent Houthi attacks. Fast attack craft are difficult for radars to detect due to their small size and ability to hide behind ocean swells. The large geographic area of the Red Sea and Gulf of Aden imposes constraints on navies' ability to respond to crises.
- 2 NUCLEAR NEGOTIATIONS.** Iran has reportedly asked the United States for support to develop a peaceful nuclear program, which is likely part of a continued Iranian effort to maintain domestic uranium enrichment. In exchange the United States is demanding that Iran remove remaining enriched nuclear material and enrichment equipment, limit its missile program, and halt support for the Axis of Resistance.
- 3 IRANIAN REGIME.** The Israel-Iran War has exacerbated pre-existing fissures between reformists and hardliners in the Iranian regime over how to engage the West. A group of 180 Iranian reformists signed a letter urging President Masoud Pezeshkian to pursue negotiations with the United States and Europe to prevent renewed conflict. Fars News rejected the statement on July 11 as "politically naive" and a "repetition of failed strategies."

Key Takeaways

- The British Navy and the European Union (EU) naval task force were unable to protect two merchant vessels from recent Houthi attacks. Ocean swells can hide small attack craft on radars, making them difficult to detect. The large geographic area of the Red Sea and Gulf of Aden that the British Navy and the EU naval task force patrol imposes constraints on the navies' ability to respond to crises.
- Iran has reportedly asked the United States for support to develop a peaceful nuclear program, which is likely part of a continued Iranian effort to maintain domestic uranium enrichment. Iran reportedly seeks to secure sanctions relief and US assistance with a civilian nuclear program. In

exchange, the United States is demanding that Iran remove remaining enriched nuclear material and enrichment equipment, limit its missile program, and halt support for the Axis of Resistance.

- The Israel-Iran War has exacerbated pre-existing fissures between reformists and hardliners in the Iranian regime over how to engage the West. A group of 180 Iranian reformists signed a letter urging President Masoud Pezeshkian to pursue negotiations with the United States and Europe to prevent renewed conflict. Islamic Revolutionary Guards Corps-affiliated Fars News rejected the statement on July 11 as “politically naive” and a “repetition of failed strategies.”

Iran

Iran has reportedly asked the United States for support to develop a peaceful nuclear program, which is likely part of a continued Iranian effort to maintain domestic uranium enrichment. An unspecified senior White House official told the *Wall Street Journal* on July 10 that Iran seeks to secure sanctions relief and US assistance with a civilian nuclear program.[11] Iran would likely seek a US-supported civilian nuclear program to involve uranium enrichment on Iranian soil, given that Iran has not changed its position on the US demand for zero uranium enrichment. Iranian Foreign Affairs Minister Abbas Araghchi told French media on July 10, for example, that enrichment is Iran's "right and need." [12] The United States sought, before the Israel-Iran War, to establish a regional nuclear consortium outside of Iran that would provide Iran with uranium for civilian nuclear purposes but would not allow enrichment on Iranian soil.[13] Iranian officials stated that Iran was open to the consortium model, but only if the consortium's enrichment facility was located in Iran.[14] Iran would similarly likely only accept US assistance with its nuclear program if the United States allows Iran to continue enriching uranium on Iranian soil.

The senior White House official said that US demands require Iran to remove remaining nuclear material and enrichment infrastructure, accept strict limits on its missile program, and halt support for the Axis of Resistance.[15] Iran would also need to resume cooperation with the International Atomic Energy Agency and agree to on-demand inspections of its nuclear facilities.[16] Senior Iranian officials have repeatedly rejected such demands.[17]

The Israel-Iran War has exacerbated pre-existing fissures between reformists and hardliners in the Iranian regime over how to engage the West. A group of 180 reformist-leaning academics, economists, and officials from former President Hassan Rouhani's administration issued a statement on July 9 that framed the war as a “costly reminder” of governance failures.[18] The statement urged President Masoud Pezeshkian to pursue negotiations with the United States and Europe to prevent renewed conflict and “preserve Iran's territorial integrity.”[19] The signatories warned that hardliners are fueling enmity and that conflict would have “disastrous consequences” on Iran.[20] Islamic Revolutionary Guards Corps-affiliated Fars News rejected the statement on July 11 as “politically naive” and a “repetition of failed strategies.”[21] Fars News claimed that the statement presented a “false dichotomy of negotiation or war.”[22] Fars News cited the US withdrawal from the Joint Comprehensive Plan of Action (JCPOA) as evidence that the United States is “untrustworthy” and that diplomacy leads to one-sided concessions.[23]

Iranian Artesh Commander Major General Amir Hatami, Artesh Air Force Commander Brigadier General Hamid Vahedi, and Deputy Artesh Commander Rear Admiral

Habibollah Sayyari inspected the Artesh Air Force 1st Tactical Airbase (TAB) in Tehran Province on July 11 to assess combat readiness.[24] The airbase is co-located at Mehrabad International Airport.[25] The Israel Defense Forces (IDF) targeted the airbase on June 15 and 16.[26] The IDF destroyed two Iranian F-14 Tomcats at the airport and likely targeted the Iran Helicopter Support and Renewal Company (PANHA) on June 16.[27] Vahedi inspected the 8th TAB in Esfahan Province and the 4th TAB in Khuzestan Province on July 7, following Israeli strikes on these bases during the Israel-Iran War.[28]

Iranian parliamentarians proposed a bill on July 11 to allocate more funding to Iranian security forces after the Israel-Iran War.[29] An Iranian parliamentarian stated on July 11 that 116 lawmakers signed a bill that would require the government to pay the entire defense budget for the current Persian calendar year (March 2025 to March 2026) in addition to unpaid previous defense allocations and oil revenues.[30] The bill would also require the Iranian Central Bank to liquidate up to 2 billion Euros from “unfrozen foreign assets” or the National Development Fund for “emergency defense projects.”[31] Israeli strikes during the 12-day war destroyed key Iranian military and defense industrial sites, including bases, production facilities, and storage facilities. CTP-ISW has not observed indications that Iranian security forces have developed or presented a coherent plan for rebuilding or modernizing their forces in the wake of the war. It is therefore unclear how Iran plans to allocate these funds.

Syria

The Kurdistan Workers’ Party (PKK) held a symbolic arms-burning ceremony at the Jasana Cave in Iraqi Kurdistan on July 11 to mark the start of its disarmament process.[32] Over 30 PKK fighters and leaders participated in the ceremony, while Turkish, Iraqi, and Kurdish officials observed it.[33] The participating PKK fighters stated that they voluntarily destroyed their weapons in response to PKK leader Abdullah Ocalan’s call to disarm.[34] Ocalan stated in February 2025 that “all groups must lay [down] their arms” and called on PKK leaders to hold a conference to dissolve the PKK.[35] The Turkish government said that the ceremony was a “concrete and welcomed” step.[36] Turkish officials previously signaled that they believe that Ocalan’s call to the PKK will pressure the Syrian Democratic Forces (SDF) to disarm and integrate into the Syrian government.[37] Turkey often conflates the SDF with the PKK and uses “PKK” to refer to the entire SDF. Syrian Kurds and SDF Commander Mazloum Abdi have consistently said that the PKK’s disarmament does not apply to Syria, however.[38]

Palestinian Territories and Lebanon

Lebanese President Joseph Aoun rejected Hezbollah’s insistence that it should retain its arms. Hezbollah Secretary General Naim Qassem called on July 8 for the implementation of the Taif Agreement, which Lebanese parliamentarians signed in 1989. The agreement sought to reform Lebanon’s political system and disarm all Lebanese militias except Hezbollah.[39] The agreement also stated that Lebanon would “tak[e] all the steps necessary to liberate all Lebanese territories from [Israel].”[40] Hezbollah has long used continued Israeli operations in southern Lebanon and the Taif Agreement to justify retaining its weapons. Qassem argued in a separate statement on July 8 that Hezbollah cannot disarm because armed resistance is the core of Hezbollah’s identity and function.[41] Aoun stated on July 11 that the Lebanese state’s decision to limit weapons to the state is

“irreversible.”[42] Aoun added that the decision to go to war, likely referring to war with Israel, would remain with the Lebanese state.[43]

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Iran Update



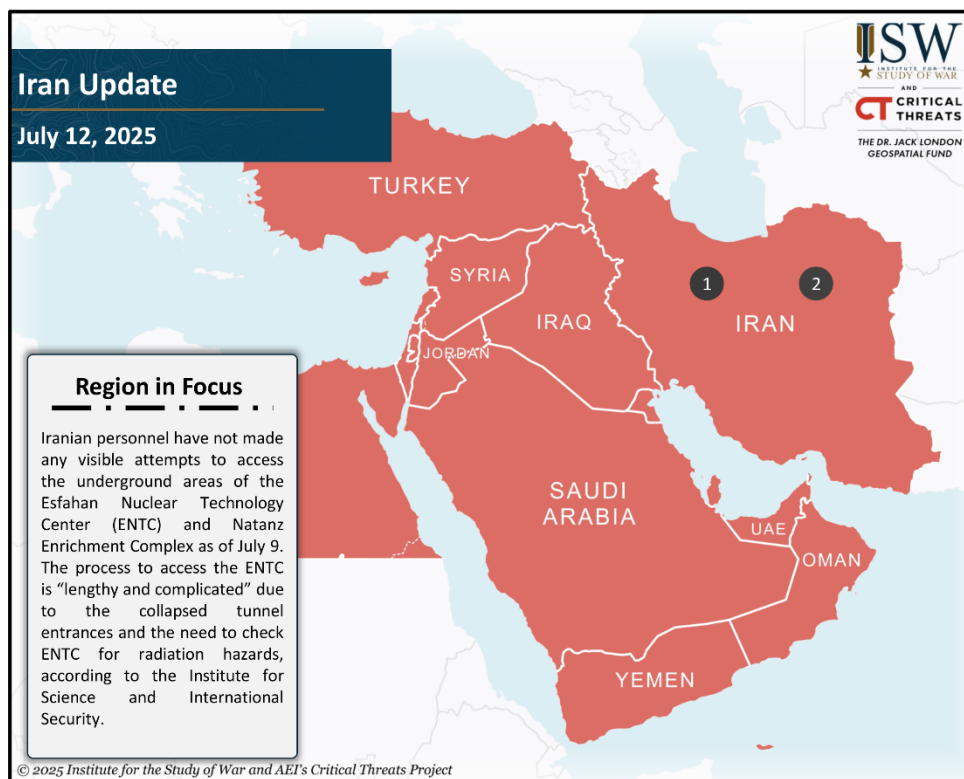
Johanna Moore, Avery Borens, Ria Reddy, and Brian Carter

July 12, 2025, Information Cutoff: 2:00 PM ET

We will publish an abbreviated Iran Update on July 12 and 13. The abbreviated update will cover updates to nuclear negotiations and information about the status of Iran's nuclear program, military, and political scene after the Israel-Iran War. We will resume our full coverage of the entire region on July 14.

Key Takeaways:

- **Iranian Nuclear Program:** Iranian personnel have not made any visible attempts to access the underground areas of the Esfahan Nuclear Technology Center (ENTC) and Natanz Enrichment Complex as of July 9. The process to repair the ENTC's facilities is "lengthy and complicated" due to the collapsed tunnel entrances and the need to check ENTC's aboveground facilities for radiation hazards, according to the Institute for Science and International Security.
- **Iran-Russia Relations:** Axios reported on July 12 that Russia has encouraged Iran to accept zero uranium enrichment demands while offering to provide Iran with 3.67 percent uranium for nuclear power and small quantities of 20 percent enriched uranium for the Tehran Research Reactor and the production of nuclear isotopes. Iran is unlikely to accept a proposal that requires Iran to halt domestic uranium enrichment.

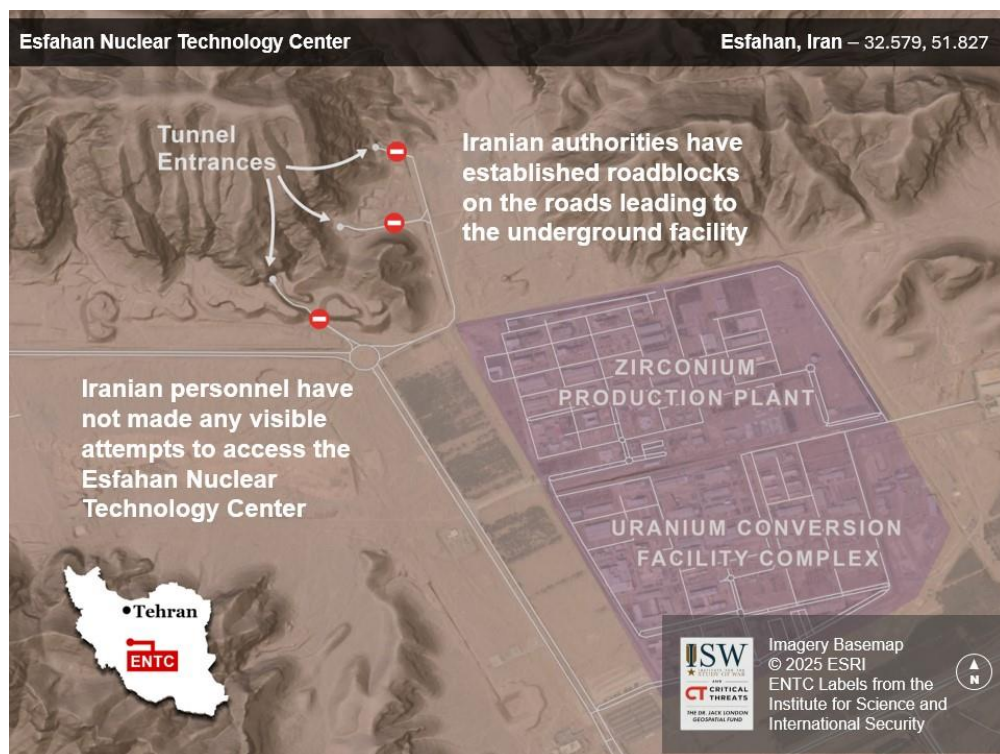


- 1 **TEHRAN, IRAN.** Iranian personnel have not made any visible attempts to access the underground areas of the Esfahan Nuclear Technology Center (ENTC) and Natanz Enrichment Complex as of July 9. The process to access the ENTC is “lengthy and complicated” due to the collapsed tunnel entrances and the need to check ENTC for radiation hazards, according to the Institute for Science and International Security.
- 2 **TEHRAN, IRAN.** Axios reported on July 12 that Russia has encouraged Iran to accept zero uranium enrichment demands while offering to provide Iran with 3.67 percent uranium for nuclear power and small quantities of 20 percent enriched uranium for the Tehran Research Reactor and the production of nuclear isotopes. Iran is unlikely to accept a proposal that requires Iran to halt domestic uranium enrichment.

Iranian personnel have not made any visible attempts to access the Esfahan Nuclear Technology Center (ENTC) or Natanz Enrichment Complex, according to satellite imagery originally published on July 9. The lack of access means that Iranian officials cannot assess the extent of the damage to the underground facilities at ENTC and Natanz with accuracy. Iranian personnel have not made visible efforts to rebuild or remove rubble from destroyed aboveground facilities at ENTC.[1] The Institute for Science and International Security (the Institute) reported that it will take Iran time to begin rebuilding the ENTC’s aboveground facilities, which house the destroyed uranium conversion facility and uranium metal production plant, because the bombing dispersed radiological and chemical material. The dispersion of this material will require Iran to deploy hazardous material (HAZMAT) teams first. Then Iran will need to remove rubble before

any large-scale reconstruction can take place. The combination of the HAZMAT requirements and the removal of debris is a “lengthy and complicated” process that will take Iran “some time” to complete, according to the Institute.

It will also take time for Iran to access ENTC’s underground facilities because it has not delivered any excavation equipment or heavy machinery to the site.[2] The Institute reported that Iran would need to use machinery to remove approximately 20 meters of rubble and backfill from tunnel entrances to access the underground facilities located at the complex.[3]



The Institute reported that satellite imagery captured through July 8 showed that Iranian personnel have not made any visible attempts to access the underground portions of the Natanz nuclear facility.[4] CTP-ISW previously reported that commercially available satellite imagery captured on June 27 showed that Iran has filled in a crater above the enrichment hall caused by the June 21 US strike.[5] Satellite imagery captured on June 8 showed that Iran has placed a cover on the point.[6]

Russia has reportedly encouraged Iran to accept zero uranium enrichment demands while offering to provide Iran with 3.67 percent uranium for nuclear power and small quantities of 20 percent enriched uranium for the Tehran Research Reactor and the production of nuclear isotopes.[7] Iran is unlikely to accept a proposal that requires Iran to halt domestic uranium enrichment.[8] Three European officials and one Israeli official told Axios on July 12 that Russia has encouraged Iran to agree to “zero enrichment” and conveyed its support for such a demand several times in the last few weeks.[9] Senior Russian officials have previously stated that Iran has the right to possess the “full nuclear fuel cycle,” including uranium enrichment capabilities.[10] Russia has recently offered to support a civilian nuclear program in Iran.[11] Iran reportedly told Putin that it will not consider zero uranium enrichment demands.[12]

Senior Iranian officials have repeatedly rejected US demands for Iran to halt domestic uranium enrichment. Iran previously rejected a US proposal to establish a regional consortium outside of Iran that would provide Iran with uranium for civilian nuclear purposes but would not allow enrichment on Iranian soil.[13] Iranian officials stated that Iran was open to the consortium model, but only if the consortium's enrichment facility was in Iran.[14]

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