

Iran Update



**Katherine Wells, Ben Rezaei, Ria Reddy, Kelly Campa, Avery Borens,
Carolyn Moorman, Ben Schmida, and Brian Carter**

Information Cutoff: 2:00pm ET

Houthi Supreme Leader Abdulmalik al Houthi acknowledged the US–Houthi ceasefire but reiterated that the Houthi movement will continue to support Hamas against Israel.[1] Abdulmalik’s statements demonstrate how the Houthis view the Red Sea attack campaign as one element of a broader Houthi strategic effort to pressure Israel to end its campaign in the Gaza Strip. The ceasefire secures an end to maritime shipping attacks, but the Houthis will continue to fire on other Israeli economic targets in pursuit of the same objectives. The Houthis have already shifted to targeting Israeli airports, for example. Abdulmalik framed the ceasefire as a victory against the United States. Abdulmalik implied that the ceasefire would not be permanent by adding that “when” the United States gets involved in a “third round” of airstrikes, the Houthis will confront the United States again.[2] The Houthis could resume attacks at any time and for any reason they choose.

Air campaigns targeting the Houthis can have only temporary military effects because the Houthis can rebuild damaged infrastructure after the end of the campaign.[3] The United States conducted at least 32 airstrikes targeting Houthi oil offloading infrastructure at Ras Issa Port between April 2 and May 5.[4] This initially created fuel shortages and posed challenges for both the Houthis’ military operations and separately civil service provision in Houthi-controlled territories, but the Houthis gradually learned techniques to ensure service continuity despite the airstrikes.[5] The US airstrikes on April 17 targeting Ras Issa Port alone cost the Houthis approximately \$700 million worth of damage, according to a Yemeni economist.[6] The Yemeni Oil Company announced on May 8 that they have successfully repaired the Ras Issa Oil Port’s filling platforms and would restore fuel distribution to all their stations within 24 hours, which demonstrates that even serious damage can be rapidly fixed.[7] Cargo ships have also reportedly resumed offloading operations at Ras Issa Port.[8] Even the best-designed air campaigns can only achieve temporary effects that must be sustained through other means.

International shipping companies are reluctant to return to Red Sea routes despite the US–Houthi ceasefire agreement, which demonstrates the limited economic and strategic impact of the most recent US air campaign against the Houthis.[9] Shipping companies are still “assessing the deal” and remain deeply skeptical about returning to the Red Sea routes because of the ambiguity of the ceasefire terms, according to the *Wall Street Journal* on May 8.[10] This includes whether the truce applies broadly to commercial shipping or just US vessels.[11] Other regional events, such as a strike on Iran’s nuclear facilities, could prompt the Houthis to target international shipping again in the future if the Houthis see a benefit in doing so. The Houthis claimed a likely Iranian attack targeting Saudi Arabia in 2019 during the 2019 US-Iran escalation, demonstrating that the Houthis will

sometimes support Iran's regional objectives even at risk to the Houthi movement.[12] The US airstrikes only addressed the tactical manifestations of the Houthi threat to the freedom of navigation in the Red Sea rather than resolving the underlying strategic and political drivers motivating the Houthis' campaign. The Wall Street Journal added that industry experts expect it could take months to restore shipping confidence.[13] The persistent risk that the Houthis could disrupt global maritime commerce for months--if not years--at a time underscores the seriousness of the Houthi strategic and economic threat.

Syrian Transitional President Ahmed al Shara reportedly wants to discuss a broad economic reconstruction plan with US President Donald Trump, likely in part to secure US sanctions relief for Syria.[14] Unspecified Syrian transitional government officials told the Wall Street Journal on May 7 that Syrian President Ahmed al Shara wants to meet US President Donald Trump to discuss broad US investment and aid to rebuild Syria.[15] Shara reportedly requested to meet with Trump during Trump's upcoming Gulf visit through US businessman and liquified natural gas (LNG) company CEO Jonathan Bass and Syrian Emergency Task Force head Mouaz Moustafa.[16] Bass and Moustafa met with Shara in Damascus on May 2 and presented him with a plan for Western firms to invest in Syria's energy industry.[17] Syria has significant oil and gas infrastructure that needs to be rebuilt or updated after over a decade of civil war.[18] Bass and Moustafa said that Shara "responded favorably" to the idea of the United States' waiving or lessening sanctions in order to make the investment possible.[19] An unspecified senior Syrian Foreign Affairs official confirmed Shara's interest by telling Western media that Syria seeks a relationship with the United States that includes "energy and economic ties." [20] Bass said that Shara and Syrian officials were also interested in participation from US companies in all areas of Syrian reconstruction.[21] The Trump administration has not yet acknowledged Shara's reported request.

Shara's proposal may seek to obtain full sanctions relief from the United States by offering investment in Syria. Shara will find it hard to meet all of the Trump administration's "confidence-building measures," and could view possible investment in Syria's energy sector as a bargaining chip.[22] The United States under the first Trump administration previously sought to allow US companies to invest in energy infrastructure in northeastern Syria, and Shara could calculate that a similar scheme would help him obtain sanctions relief.[23] US sanctions that have been in place since the fall of the Assad regime currently prevent direct US economic involvement in Syria. Shara and Syrian transitional government officials have attempted to attain partial or full US sanctions relief since assuming power in December 2024 and have communicated back and forth about several "confidence-building" conditions that the US requested that Syria observe.[24] The Syrian government said that it plans to fully address most of the US demands, including the destruction of remaining chemical weapons stockpiles and the appointment of a liaison to assist efforts to find missing US citizen Austin Tice.[25] The government has also taken tangible steps to honor the US request that it limit Palestinian military and political activity in Syria.[26] Shara is likely unwilling to act on the US condition that he bar foreign fighters from senior government positions, however, given that this condition would require him to sideline individuals who are deeply loyal to him.[27] Shara said on May 8 during a press conference in Paris that his government guarantees that foreign fighters will not pose a threat to neighboring countries, which suggests that he does not plan to remove them from the current Syrian army ranks or offices.[28] Shara could calculate that a counter-proposal that creates opportunities for US industry in

Syria could mitigate his unwillingness to fully observe all the US conditions and still secure sanction relief on Syria.

Syrian officials may also be attempting to exploit perceived US interest in curtailing the People’s Republic of China (PRC) influence abroad in order to secure US sanctions relief and economic support. Unspecified Syrian government officials described Shara’s proposal as a “Marshall Plan-style” program in which US and other Western companies would invest in Syria’s reconstruction instead of China or other powers, according to the Wall Street Journal.[29] That the Syrian officials reportedly specified that Shara would be willing to exclude China suggests that the Syrian government may be attempting to exploit a perceived US interest in curbing the PRC’s influence abroad in order to spur US interest and investment in Syria. Bass said that Shara wants “Boeing” and “US telecom” and not “Huawei,” referring to the Chinese telecommunications company that has invested heavily in partnerships in the Middle East.[30]

Recent steps by the Syrian government suggest that it seeks to develop genuine economic partnerships with US adversaries like China and Russia if it cannot secure sanctions relief and economic assistance elsewhere, however. The Syrian government most recently hosted PRC officials on March 27 and discussed “enhancing cooperation,” which CTP-ISW assessed was likely related to securing Chinese support for the transition.[31] Shara and the Syrian transport minister have met with Chinese transport and medical manufacturing businessmen to discuss Chinese investment in Syria within the past week.[32] The Syrian government also reinitiated Syria’s economic ties with Russia in recent months. Russia has delivered Syrian currency and Russian oil to Syria, and Russia also reportedly seeks to re-negotiate Russian investment contracts for phosphate mines and oil fields in the central Syrian desert.[33] Both PRC and Russian officials have made it clear that they seek to increase involvement in Syria. Chinese President Xi Jinping and Russian President Vladimir Putin released a joint statement on May 8 following a press conference in Moscow that emphasized Russian and Chinese support for Syria’s “sovereignty, independence, and territorial integrity.”[34]

A Qatari-backed initiative will provide Syria with civil sector salary support after the US Treasury Department reportedly granted Qatar a sanctions exemption.[35] Reuters originally reported that the Treasury Department granted the sanctions exemption, but the United States has not yet confirmed the sanctions exemption.[36] The Qatari-backed grant initiative will provide Syria with \$27 million monthly for three months to pay the salaries of select civilian public sector workers.[37] An unspecified Syrian financial source told Western media that the grant is conditional and will not apply to Syrian Defense Ministry or Interior Ministry personnel.[38] The Syrian government previously announced in January 2025 that it would raise public sector salaries by 400% the following month, but has yet to do so due to a lack of funding.[39] The unspecified Syrian source said that the Qatari funding will help implement this salary raise over the next several months and that the Syrian government would acquire other funds for employees excluded from the initiative.[40] Qatar had previously delayed this initiative in late February 2025 due to uncertainty over whether the funding would breach US sanctions.[41] Syrian Finance Minister Mohammad Yasser Barniyeh welcomed the exemption and said that the Syrian government hopes it will be followed by further measures to ease sanctions.[42] Barniyeh is an economist trained at Damascus, Kansas State, and Oklahoma State universities before working for the Arab Monetary Fund.[43] Barniyeh

participated in the liberalization of the Assad regime's economy in the early 2000s, when he served on the Syrian Commission on Financial Markets and the Damascus Securities Exchange.[44]

Senior Iranian military officials inspected a military facility in southern Iran, likely as part of preparations for a potential US or Israeli strike on Iran. Islamic Revolutionary Guards Corps (IRGC) Commander Major General Hossein Salami and IRGC Navy Commander Rear Admiral Ali Reza Tangsiri inspected an underground drone hangar in Hormozgan Province on May 8.[45] Salami threatened to attack any country that supports an attack on Iran. Footage of the base during the visit showed Iranian Mohajer-6 and Ababil-5 drones. Mohajer-6 and Ababil-5 drones have a range of 200 and 480 km, respectively.[46] The precise location of the facility is unclear, but the inspection of a base hosting drones that has the range to target most of the Persian Gulf from the southern Iranian coast suggests that Iranian officers were inspecting units and reviewing plans for post-strike responses in the Persian Gulf region. Hormozgan Province lies along Iran's southern coast. The visit follows a series of similar inspections at Iranian military and defense sites in Hormozgan and the surrounding provinces.[47] Senior military officers often visit units and facilities under their command as part of their preparations for major defensive and offensive operations to ensure that their commands are well-prepared. IRGC-affiliated media also published old footage on May 8 that showed an Iranian Mohajer-6 drone surveilling the USS *Dwight D. Eisenhower* aircraft carrier.[48] Artesh Air Force Commander Brigadier General Hamid Vahedi separately claimed on May 8 that Iran equipped all of its fighter jets with long-range munitions and updated navigation systems.[49] Most Iranian fighter jets are Cold War third- and fourth-generation aircraft like the F4 Phantom and F14 Tomcat. These threats follow new US threats to attack Iran. US President Donald Trump stated on May 7 that he wants to "blow up" Iran's nuclear centrifuges either "nicely" through an agreement with Iran or "viciously." [50]

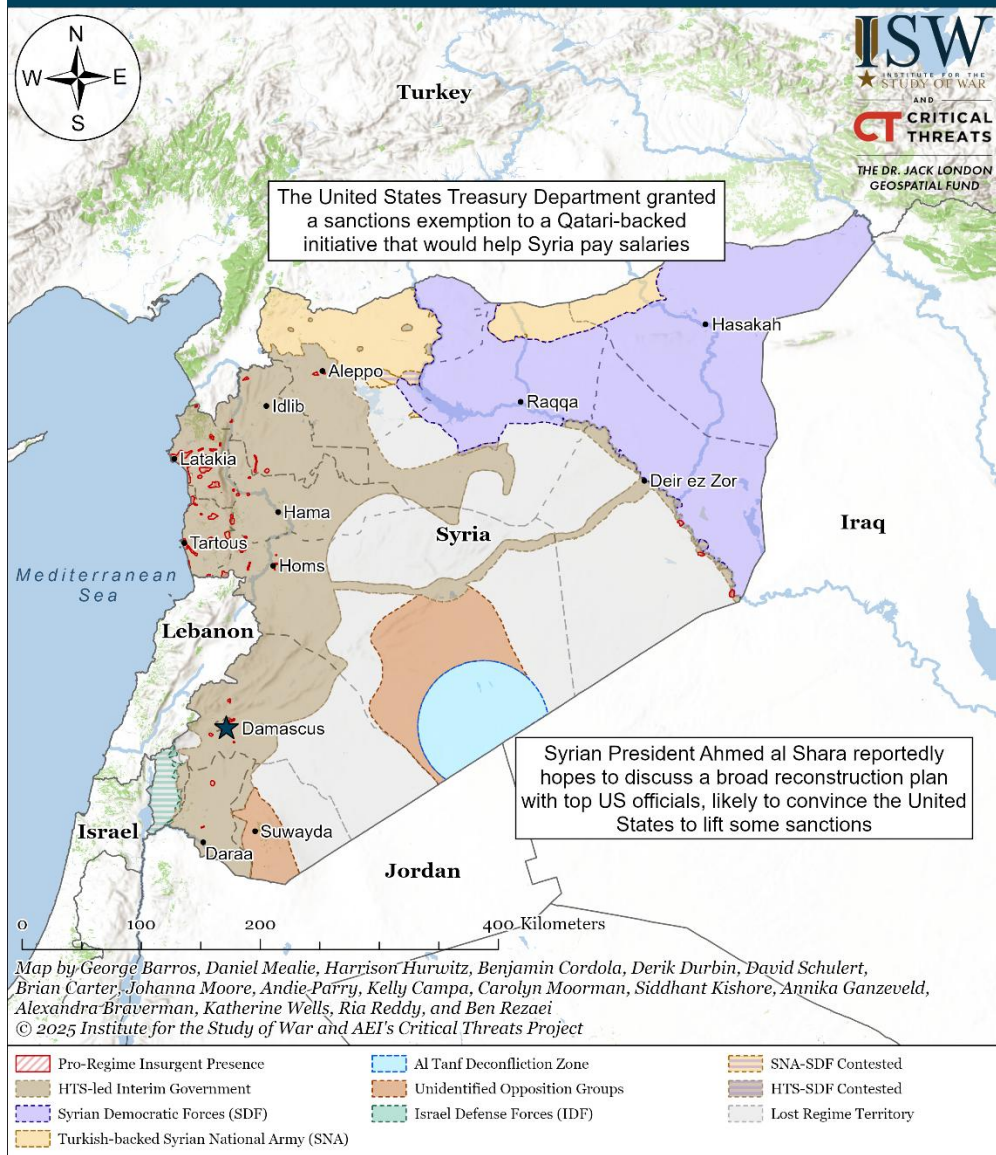
An attempted Iranian attack on the Israeli embassy in London highlights the unconventional ways through which Iran has and will likely continue to attempt to impose costs on Israel. UK authorities arrested eight Iranian nationals on May 4 after foiling a suspected Iranian-directed terror plot to target the Israeli Embassy in London.[51] The *Guardian* reported on May 8 that the UK police conducted its largest raid across the country due to threats of a suspected terror plot.[52] UK MI5 assessed that the plot had reached an "advanced but not imminent" stage and detained the suspects. Iranian Foreign Affairs Minister Abbas Araghchi denied Iranian involvement in the terror plot and called for diplomacy.[53] It is possible that the Iranian IRGC did not notify Araghchi about this plot. The IRGC has previously failed to notify other government bodies about its operations.[54] Iran has historically relied on unconventional methods to impose costs on Israel, including conducting terror attacks on Israeli diplomatic and civilian targets abroad. This recent Iranian plot in the UK does not represent an inflection in Iranian activity but is part of a decades-long strategy that includes assassination and bombing plots against Israeli interests in Argentina, Cyprus, Turkey, Georgia, Greece, and Azerbaijan.[55] Iranian officials and Iranian media have previously suggested that Iran may attack Israeli diplomatic facilities in response to the Israeli airstrike near the Iranian embassy in Damascus in April 2024.[56] Iranian officials have also repeatedly warned that Iran will conduct a third missile attack on Israel.[57] Israeli strikes on Iran in October 2024 damaged Iranian long-range missile production, which suggests that Iran's ability to respond militarily using its missile stockpile may be somewhat constrained. Iran can still impose costs on Israel by attacking Israeli diplomatic targets in the region and beyond, however.[58]

Key Takeaways:

- **Houthis Respond to Ceasefire:** Houthi Supreme Leader Abdulmalik al Houthi acknowledged the US–Houthi ceasefire but reiterated that the Houthi movement will continue to support Hamas against Israel. Air campaigns targeting the Houthis can have only temporary military effects because the Houthis can rebuild damaged infrastructure after the end of the campaign. International shipping companies are reluctant to return to Red Sea routes despite the US–Houthi ceasefire agreement, which demonstrates the limited economic and strategic impact of the most recent US air campaign against the Houthis.
- **Syria and Sanctions Relief:** Syrian Transitional President Ahmed al Shara reportedly wants to discuss a broad economic reconstruction plan with US President Donald Trump, likely in part to secure US sanctions relief for Syria.
- **Syrian Salaries:** A Qatari-backed initiative will provide Syria with civil sector salary support after the US Treasury Department reportedly granted Qatar a sanctions exemption.
- **Iranian Officers Inspect Military Facilities:** Senior Iranian military officials inspected a military facility in southern Iran, likely as part of preparations for a potential US or Israeli strike on Iran.
- **Iranian Terrorist Operations in the United Kingdom:** An attempted Iranian attack on the Israeli embassy in London highlights the unconventional ways through which Iran has and will likely continue to attempt to impose costs on Israel.

Assessed Control of Terrain in Syria

May 8, 2025 at 2:00 PM EST



Iranian Decision-Making, Internal Dynamics, and Foreign Policy

The Iranian rial depreciated from 828,500 rials to one US dollar on May 7 to 831,000 rials to one US dollar on May 8.[59]

Iranian Foreign Affairs Minister Abbas Araghchi met with Indian officials in New Delhi, India, on May 8 to discuss India-Pakistan tensions and bilateral economic cooperation.[60] Araghchi met with Indian President Droupadi Murmu and Foreign Minister Subrahmanyam Jaishankar.[61] Araghchi and Jaishankar discussed the implementation of the May 2024 ten-year Chabahar cooperation agreement.[62] The agreement outlines the development of Iran's southeastern Chabahar port to facilitate trade between Iran, Afghanistan, and Central Asian countries, which effectively bypasses Pakistani ports.[63] India was the second largest importer of Iranian oil

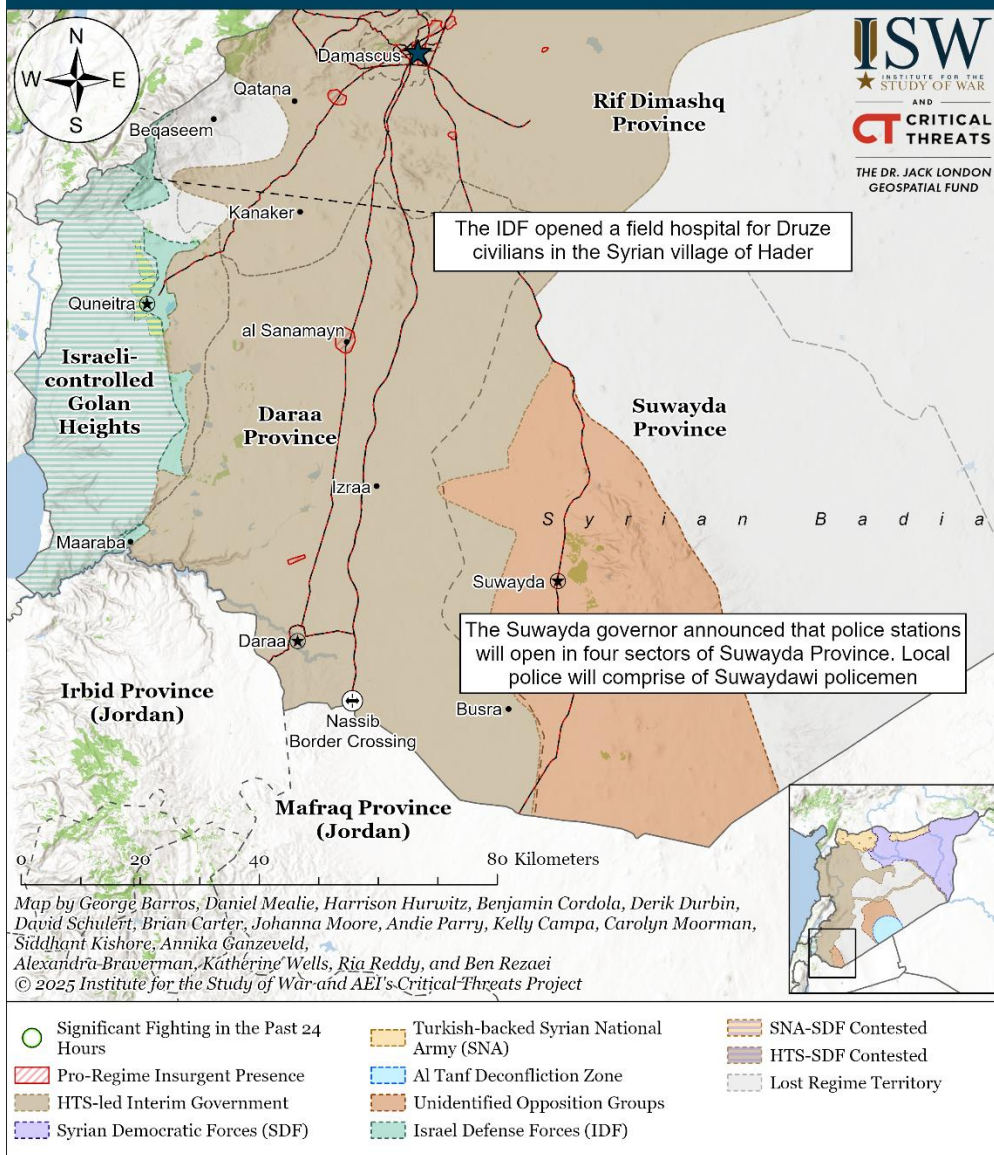
before the US maximum pressure campaign in 2018.[64] Araghchi also met with Pakistani officials in Pakistan on May 5.[65] This series of meetings comes amid military escalation between India and Pakistan.[66]

Supreme National Security Council Secretary Ali Akbar Ahmadian stated that direct negotiations under “threat or coercion” are irrational and dishonorable but that negotiations in “equal, pressure-free conditions” are “rational and honorable.”[67] Ahmadian’s remarks may lay the ground for justifying direct negotiations with the United States. Ahmadian’s remarks follow an Israeli report on May 7 that Iranian Foreign Affairs Minister Abbas Araghchi approached US Special Envoy to the Middle East Steve Witkoff to request direct US-Iran negotiations, reportedly due to Iran’s frustration with the slow progress of Omani-mediated talks.[68] The fourth round of US-Iran talks, initially scheduled for May 3, was postponed due to “logistical reasons.”[69]

Syria

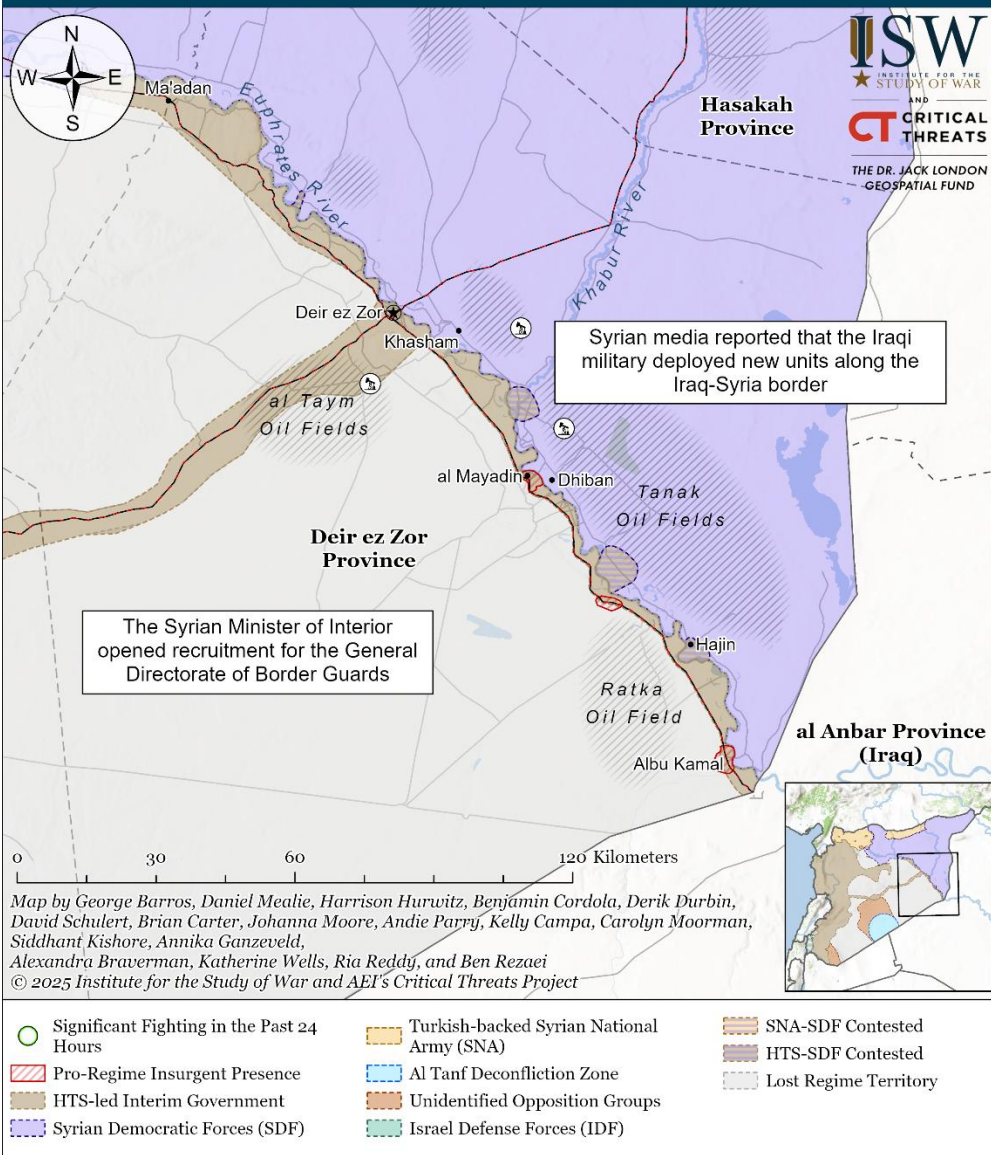
The Israel Defense Forces (IDF) opened a field hospital for Druze civilians in Hader, Quneitra Province, on May 8.[70] The IDF Arabic-language spokesperson announced that the field hospital is part of the IDF’s efforts to support the Syrian Druze population.[71] The IDF has been operating in Hader since December 2024.[72] The establishment of an IDF field hospital in Hader follows Israel’s efforts to pressure the Syrian transitional government to halt sectarian violence against the Syrian Druze community.[73]

Assessed Control of Terrain in Southern Syria May 8, 2025 at 2:00 PM EST



The Syrian and Iraqi governments continued to strengthen border security on both sides of the northern Syria-Iraq border.[74] The Syrian Interior Ministry began to recruit new members for the General Directorate of Border Guards on May 8.[75] The Syrian Defense Ministry recently deployed forces to the Iraqi border on April 18 to tighten control and curb illegal smuggling activities.[76] Syrian media also reported on May 7 that the Iraqi Army deployed new unspecified military units along the border across from the Syrian towns of Albu Kamal and Baghouz.[77] The Iraqi Army previously deployed the 34th Armored Brigade's 1st Tank Battalion, which operates under the 9th Armored Division, to the Iraq-Syria border on April 16.[78] Iraqi Interior Minister Abdul Amir al Shammari said in an interview on May 6 that the Iraqi federal government has had no security coordination with the Syrian Interior Ministry yet.[79]

Assessed Control of Terrain around Deir ez Zor May 8, 2025 at 2:00 PM EST



Iraq

Iraqi media reported that a “high-level” Shia Coordination Framework delegation will discuss multiple “key” issues with Iranian officials from May 8 to 9, including the upcoming November 2025 Iraqi parliamentary elections.[80] The Shia Coordination Framework is a loose coalition of Shia political parties, some of which Iran backs. A Shia Coordination Framework source stated that the delegation represents all Shia Coordination Framework components and is authorized to “reach an understanding with Tehran on certain [unspecified] issues of mutual understanding.”[81] Iran reportedly sent a message to Shia Coordination Framework leaders on April 30 that called on the Shia Coordination Framework to remain unified ahead of the upcoming elections. Iran’s message likely aims to increase the likelihood that Iranian-backed parties will maintain control

of the Iraqi government.[82] A fragmented Shia Coordination Framework could allow smaller, less organized parties to outperform Iranian-backed parties.

Iraqi Prime Minister Mohammed Shia al Sudani and Turkish President Recep Tayyip Erdogan signed multiple memoranda of understanding (MOU) during bilateral talks in Ankara, Turkey, on May 8.[83] The MoUs focused on multiple areas, including defense manufacturing and counter-narcotics. Sudani emphasized the importance of Iraq-Turkey security and counterterrorism cooperation and welcomed efforts to disarm the Kurdistan Workers' Party (PKK) during a press conference with Erdogan.[84] Iraq, Syria, Turkey, and Jordan agreed in February 2025 to form a strategic alliance to counter the Islamic State.[85]

Arabian Peninsula

Axis of Resistance objectives:

- Harden the Houthi regime against internal dissent in Houthi-controlled areas
- Destroy the anti-Houthi opposition in order to control all of Yemen
- Erode Israeli will to continue the war in the Gaza Strip

See topline section.

The Palestinian Territories and Lebanon

Nothing Significant to Report.

CTP-ISW will not be covering the new Israeli operation in the Gaza Strip. We have reprioritized our Middle East coverage to focus on Iran's nuclear program, Iranian domestic security, and Iranian efforts to rebuild its networks into the Levant, including the Palestinian Territories. Given that Israel and its partners have destroyed Hamas' military organization and severed the group's ability to resupply itself, we are now focused on how Iran seeks to rebuild its lines of communication with Hezbollah and Hamas through Syria.

The Iran Update provides insights into Iranian and Iranian-sponsored activities abroad that undermine regional stability and threaten US forces and interests. It also covers events and trends that affect the stability and decision-making of the Iranian regime. The Critical Threats Project (CTP) at the American Enterprise Institute and the Institute for the Study of War (ISW) provides these updates regularly based on regional events.

CTP-ISW defines the "Axis of Resistance" as the unconventional alliance that Iran has cultivated in the Middle East since the Islamic Republic came to power in 1979. This transnational coalition is comprised of state, semi-state, and non-state actors that cooperate to secure their collective interests. Tehran considers itself to be both part of the alliance and its leader. Iran furnishes these groups with varying levels of financial, military, and political support in exchange for some degree of influence or control over their actions. Some are traditional proxies that are highly responsive to Iranian direction, while others are partners over which Iran exerts more limited influence. Members of the Axis of Resistance are united by their grand strategic objectives, which include eroding and eventually expelling American influence from the Middle East, destroying the Israeli state, or both. Pursuing

these objectives and supporting the Axis of Resistance to those ends have become cornerstones of Iranian regional strategy.

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Iran Update, May 8, 2025

Katherine Wells, Ben Rezaei, Ria Reddy, Kelly Campa, Avery Borens, Carolyn Moorman, Ben Schmida, and Brian Carter

Information Cutoff: 2:00pm ET

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 every weekday.

Click [here](#) to see CTP and ISW’s interactive map of the ongoing opposition offensive 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.

We do not report in detail on war crimes because these activities are well-covered in Western media and do not directly affect the military operations we are assessing and forecasting. We utterly condemn violations of the laws of armed conflict and the Geneva Conventions and crimes against humanity even though we do not describe them in these reports.

A variety of Syrian armed groups, including those associated with the new transitional government, the Assad regime, and hardline Islamic groups, have committed a series of extrajudicial killings since the fall of the Assad regime in December 2024. CTP-ISW absolutely condemns these extrajudicial killings.

Houthi Supreme Leader Abdulmalik al Houthi acknowledged the US–Houthi ceasefire but reiterated that the Houthi movement will continue to support Hamas against Israel.[1] Abdulmalik’s statements demonstrate how the Houthis view the Red Sea attack campaign as one element of a broader Houthi strategic effort to pressure Israel to end its campaign in the Gaza Strip. The ceasefire secures an end to maritime shipping attacks, but the Houthis will continue to fire on other Israeli economic targets in pursuit of the same objectives. The Houthis have already shifted to targeting Israeli airports, for example. Abdulmalik framed the ceasefire as a victory against the United States. Abdulmalik implied that the ceasefire would not be permanent by adding that “when” the United States gets involved in a “third round” of airstrikes, the Houthis will confront the United States again.[2] The Houthis could resume attacks at any time and for any reason they choose.

Air campaigns targeting the Houthis can have only temporary military effects because the Houthis can rebuild damaged infrastructure after the end of the campaign.[3] The United States conducted at least 32 airstrikes targeting Houthi oil offloading infrastructure at Ras Issa Port between April 2 and May 5.[4] This initially created fuel shortages and posed challenges for both the Houthis’ military operations and separately civil service provision in Houthi-controlled territories, but the Houthis gradually learned techniques to ensure service continuity despite the airstrikes.[5] The US airstrikes on April 17 targeting Ras Issa Port alone cost the Houthis approximately \$700 million worth of damage, according to a Yemeni economist.[6] The Yemeni Oil Company announced on May 8 that they have successfully repaired the Ras Issa Oil Port’s filling platforms and would restore fuel distribution to all their stations within 24 hours, which demonstrates that even serious damage can be rapidly fixed.[7] Cargo ships have also reportedly resumed offloading operations at Ras Issa Port.[8] Even the best-designed air campaigns can only achieve temporary effects that must be sustained through other means.

International shipping companies are reluctant to return to Red Sea routes despite the US–Houthi ceasefire agreement, which demonstrates the limited economic and strategic impact of the most recent US air campaign against the Houthis.[9] Shipping companies are still “assessing the deal” and remain deeply skeptical about returning to the Red Sea routes because of the ambiguity of the ceasefire terms, according to the *Wall Street Journal* on May 8.[10] This includes whether the truce applies broadly to commercial shipping or just US vessels.[11] Other regional events, such as a strike on Iran’s nuclear facilities, could prompt the Houthis to target international shipping

again in the future if the Houthis see a benefit in doing so. The Houthis claimed a likely Iranian attack targeting Saudi Arabia in 2019 during the 2019 US-Iran escalation, demonstrating that the Houthis will sometimes support Iran's regional objectives even at risk to the Houthi movement.[12] The US airstrikes only addressed the tactical manifestations of the Houthi threat to the freedom of navigation in the Red Sea rather than resolving the underlying strategic and political drivers motivating the Houthis' campaign. The Wall Street Journal added that industry experts expect it could take months to restore shipping confidence.[13] The persistent risk that the Houthis could disrupt global maritime commerce for months--if not years--at a time underscores the seriousness of the Houthi strategic and economic threat.

Syrian Transitional President Ahmed al Shara reportedly wants to discuss a broad economic reconstruction plan with US President Donald Trump, likely in part to secure US sanctions relief for Syria.[14] Unspecified Syrian transitional government officials told the Wall Street Journal on May 7 that Syrian President Ahmed al Shara wants to meet US President Donald Trump to discuss broad US investment and aid to rebuild Syria.[15] Shara reportedly requested to meet with Trump during Trump's upcoming Gulf visit through US businessman and liquified natural gas (LNG) company CEO Jonathan Bass and Syrian Emergency Task Force head Mouaz Moustafa.[16] Bass and Moustafa met with Shara in Damascus on May 2 and presented him with a plan for Western firms to invest in Syria's energy industry.[17] Syria has significant oil and gas infrastructure that needs to be rebuilt or updated after over a decade of civil war.[18] Bass and Moustafa said that Shara "responded favorably" to the idea of the United States' waiving or lessening sanctions in order to make the investment possible.[19] An unspecified senior Syrian Foreign Affairs official confirmed Shara's interest by telling Western media that Syria seeks a relationship with the United States that includes "energy and economic ties." [20] Bass said that Shara and Syrian officials were also interested in participation from US companies in all areas of Syrian reconstruction.[21] The Trump administration has not yet acknowledged Shara's reported request.

Shara's proposal may seek to obtain full sanctions relief from the United States by offering investment in Syria. Shara will find it hard to meet all of the Trump administration's "confidence-building measures," and could view possible investment in Syria's energy sector as a bargaining chip.[22] The United States under the first Trump administration previously sought to allow US companies to invest in energy infrastructure in northeastern Syria, and Shara could calculate that a similar scheme would help him obtain sanctions relief.[23] US sanctions that have been in place since the fall of the Assad regime currently prevent direct US economic involvement in Syria. Shara and Syrian transitional government officials have attempted to attain partial or full US sanctions relief since assuming power in December 2024 and have communicated back and forth about several "confidence-building" conditions that the US requested that Syria observe.[24] The Syrian government said that it plans to fully address most of the US demands, including the destruction of remaining chemical weapons stockpiles and the appointment of a liaison to assist efforts to find missing US citizen Austin Tice.[25] The government has also taken tangible steps to honor the US request that it limit Palestinian military and political activity in Syria.[26] Shara is likely unwilling to act on the US condition that he

bar foreign fighters from senior government positions, however, given that this condition would require him to sideline individuals who are deeply loyal to him.[27] Shara said on May 8 during a press conference in Paris that his government guarantees that foreign fighters will not pose a threat to neighboring countries, which suggests that he does not plan to remove them from the current Syrian army ranks or offices.[28] Shara could calculate that a counter-proposal that creates opportunities for US industry in Syria could mitigate his unwillingness to fully observe all the US conditions and still secure sanction relief on Syria.

Syrian officials may also be attempting to exploit perceived US interest in curtailing the People’s Republic of China (PRC) influence abroad in order to secure US sanctions relief and economic support. Unspecified Syrian government officials described Shara’s proposal as a “Marshall Plan-style” program in which US and other Western companies would invest in Syria’s reconstruction instead of China or other powers, according to the Wall Street Journal.[29] That the Syrian officials reportedly specified that Shara would be willing to exclude China suggests that the Syrian government may be attempting to exploit a perceived US interest in curbing the PRC’s influence abroad in order to spur US interest and investment in Syria. Bass said that Shara wants “Boeing” and “US telecom” and not “Huawei,” referring to the Chinese telecommunications company that has invested heavily in partnerships in the Middle East.[30]

Recent steps by the Syrian government suggest that it seeks to develop genuine economic partnerships with US adversaries like China and Russia if it cannot secure sanctions relief and economic assistance elsewhere, however. The Syrian government most recently hosted PRC officials on March 27 and discussed “enhancing cooperation,” which CTP-ISW assessed was likely related to securing Chinese support for the transition.[31] Shara and the Syrian transport minister have met with Chinese transport and medical manufacturing businessmen to discuss Chinese investment in Syria within the past week.[32] The Syrian government also reinitiated Syria’s economic ties with Russia in recent months. Russia has delivered Syrian currency and Russian oil to Syria, and Russia also reportedly seeks to re-negotiate Russian investment contracts for phosphate mines and oil fields in the central Syrian desert.[33] Both PRC and Russian officials have made it clear that they seek to increase involvement in Syria. Chinese President Xi Jinping and Russian President Vladimir Putin released a joint statement on May 8 following a press conference in Moscow that emphasized Russian and Chinese support for Syria’s “sovereignty, independence, and territorial integrity.”[34]

A Qatari-backed initiative will provide Syria with civil sector salary support after the US Treasury Department reportedly granted Qatar a sanctions exemption.[35] Reuters originally reported that the Treasury Department granted the sanctions exemption, but the United States has not yet confirmed the sanctions exemption.[36] The Qatari-backed grant initiative will provide Syria with \$27 million monthly for three months to pay the salaries of select civilian public sector workers.[37] An unspecified Syrian financial source told Western media that the grant is conditional and will not apply to Syrian Defense Ministry or Interior Ministry personnel.[38] The

Syrian government previously announced in January 2025 that it would raise public sector salaries by 400% the following month, but has yet to do so due to a lack of funding.[39] The unspecified Syrian source said that the Qatari funding will help implement this salary raise over the next several months and that the Syrian government would acquire other funds for employees excluded from the initiative.[40] Qatar had previously delayed this initiative in late February 2025 due to uncertainty over whether the funding would breach US sanctions.[41] Syrian Finance Minister Mohammad Yasser Barniyeh welcomed the exemption and said that the Syrian government hopes it will be followed by further measures to ease sanctions.[42] Barniyeh is an economist trained at Damascus, Kansas State, and Oklahoma State universities before working for the Arab Monetary Fund.[43] Barniyeh participated in the liberalization of the Assad regime's economy in the early 2000s, when he served on the Syrian Commission on Financial Markets and the Damascus Securities Exchange.[44]

Syria CoT Map

Senior Iranian military officials inspected a military facility in southern Iran, likely as part of preparations for a potential US or Israeli strike on Iran. Islamic Revolutionary Guards Corps (IRGC) Commander Major General Hossein Salami and IRGC Navy Commander Rear Admiral Ali Reza Tangsiri inspected an underground drone hangar in Hormozgan Province on May 8.[45] Salami threatened to attack any country that supports an attack on Iran. Footage of the base during the visit showed Iranian Mohajer-6 and Ababil-5 drones. Mohajer-6 and Ababil-5 drones have a range of 200 and 480 km, respectively.[46] The precise location of the facility is unclear, but the inspection of a base hosting drones that has the range to target most of the Persian Gulf from the southern Iranian coast suggests that Iranian officers were inspecting units and reviewing plans for post-strike responses in the Persian Gulf region. Hormozgan Province lies along Iran's southern coast. The visit follows a series of similar inspections at Iranian military and defense sites in Hormozgan and the surrounding provinces.[47] Senior military officers often visit units and facilities under their command as part of their preparations for major defensive and offensive operations to ensure that their commands are well-prepared. IRGC-affiliated media also published old footage on May 8 that showed an Iranian Mohajer-6 drone surveilling the USS *Dwight D. Eisenhower* aircraft carrier.[48] Artesh Air Force Commander Brigadier General Hamid Vahedi separately claimed on May 8 that Iran equipped all of its fighter jets with long-range munitions and updated navigation systems.[49] Most Iranian fighter jets are Cold War third- and fourth-generation aircraft like the F4 Phantom and F14 Tomcat. These threats follow new US threats to attack Iran. US President Donald Trump stated on May 7 that he wants to "blow up" Iran's nuclear centrifuges either "nicely" through an agreement with Iran or "viciously." [50]

An attempted Iranian attack on the Israeli embassy in London highlights the unconventional ways through which Iran has and will likely continue to attempt to impose costs on Israel. UK authorities arrested eight Iranian nationals on May 4 after foiling a suspected Iranian-directed terror plot to target the Israeli Embassy in

London.[51] The *Guardian* reported on May 8 that the UK police conducted its largest raid across the country due to threats of a suspected terror plot.[52] UK MI5 assessed that the plot had reached an “advanced but not imminent” stage and detained the suspects. Iranian Foreign Affairs Minister Abbas Araghchi denied Iranian involvement in the terror plot and called for diplomacy.[53] It is possible that the Iranian IRGC did not notify Araghchi about this plot. The IRGC has previously failed to notify other government bodies about its operations.[54] Iran has historically relied on unconventional methods to impose costs on Israel, including conducting terror attacks on Israeli diplomatic and civilian targets abroad. This recent Iranian plot in the UK does not represent an inflection in Iranian activity but is part of a decades-long strategy that includes assassination and bombing plots against Israeli interests in Argentina, Cyprus, Turkey, Georgia, Greece, and Azerbaijan.[55] Iranian officials and Iranian media have previously suggested that Iran may attack Israeli diplomatic facilities in response to the Israeli airstrike near the Iranian embassy in Damascus in April 2024.[56] Iranian officials have also repeatedly warned that Iran will conduct a third missile attack on Israel.[57] Israeli strikes on Iran in October 2024 damaged Iranian long-range missile production, which suggests that Iran’s ability to respond militarily using its missile stockpile may be somewhat constrained. Iran can still impose costs on Israel by attacking Israeli diplomatic targets in the region and beyond, however.[58]

Key Takeaways:

- **Houthis Respond to Ceasefire:** Houthi Supreme Leader Abdulmalik al Houthi acknowledged the US–Houthi ceasefire but reiterated that the Houthi movement will continue to support Hamas against Israel. Air campaigns targeting the Houthis can have only temporary military effects because the Houthis can rebuild damaged infrastructure after the end of the campaign. International shipping companies are reluctant to return to Red Sea routes despite the US–Houthi ceasefire agreement, which demonstrates the limited economic and strategic impact of the most recent US air campaign against the Houthis.
- **Syria and Sanctions Relief:** Syrian Transitional President Ahmed al Shara reportedly wants to discuss a broad economic reconstruction plan with US President Donald Trump, likely in part to secure US sanctions relief for Syria.
- **Syrian Salaries:** A Qatari-backed initiative will provide Syria with civil sector salary support after the US Treasury Department reportedly granted Qatar a sanctions exemption.
- **Iranian Officers Inspect Military Facilities:** Senior Iranian military officials inspected a military facility in southern Iran, likely as part of preparations for a potential US or Israeli strike on Iran.
- **Iranian Terrorist Operations in the United Kingdom:** An attempted Iranian attack on the Israeli embassy in London highlights the unconventional ways through which Iran has and will likely continue to attempt to impose costs on Israel.

Iranian Decision-Making, Internal Dynamics, and Foreign Policy

The Iranian rial depreciated from 828,500 rials to one US dollar on May 7 to 831,000 rials to one US dollar on May 8.[59]

Iranian Foreign Affairs Minister Abbas Araghchi met with Indian officials in New Delhi, India, on May 8 to discuss India-Pakistan tensions and bilateral economic cooperation.[60] Araghchi met with Indian President Droupadi Murmu and Foreign Minister Subrahmanyam Jaishankar.[61] Araghchi and Jaishankar discussed the implementation of the May 2024 ten-year Chabahar cooperation agreement.[62] The agreement outlines the development of Iran's southeastern Chabahar port to facilitate trade between Iran, Afghanistan, and Central Asian countries, which effectively bypasses Pakistani ports.[63] India was the second largest importer of Iranian oil before the US maximum pressure campaign in 2018.[64] Araghchi also met with Pakistani officials in Pakistan on May 5.[65] This series of meetings comes amid military escalation between India and Pakistan.[66]

Supreme National Security Council Secretary Ali Akbar Ahmadian stated that direct negotiations under “threat or coercion” are irrational and dishonorable but that negotiations in “equal, pressure-free conditions” are “rational and honorable.”[67] Ahmadian's remarks may lay the ground for justifying direct negotiations with the United States. Ahmadian's remarks follow an Israeli report on May 7 that Iranian Foreign Affairs Minister Abbas Araghchi approached US Special Envoy to the Middle East Steve Witkoff to request direct US-Iran negotiations, reportedly due to Iran's frustration with the slow progress of Omani-mediated talks.[68] The fourth round of US-Iran talks, initially scheduled for May 3, was postponed due to “logistical reasons.”[69]

Syria

The Israel Defense Forces (IDF) opened a field hospital for Druze civilians in Hader, Quneitra Province, on May 8.[70] The IDF Arabic-language spokesperson announced that the field hospital is part of the IDF's efforts to support the Syrian Druze population.[71] The IDF has been operating in Hader since December 2024.[72] The establishment of an IDF field hospital in Hader follows Israel's efforts to pressure the Syrian transitional government to halt sectarian violence against the Syrian Druze community.[73]

Southwestern Syria Map

The Syrian and Iraqi governments continued to strengthen border security on both sides of the northern Syria-Iraq border.[74] The Syrian Interior Ministry began to recruit new members for the General Directorate of Border Guards on May 8.[75] The Syrian Defense Ministry recently deployed forces to the Iraqi border on April 18 to tighten control and curb illegal smuggling activities.[76] Syrian media also reported on May 7 that the Iraqi Army deployed new unspecified military units along the border across from the Syrian towns of Albu Kamal and Baghouz.[77] The Iraqi Army previously deployed the 34th Armored Brigade's 1st Tank Battalion, which operates under the 9th Armored Division, to the Iraq-Syria border on April 16.[78] Iraqi Interior Minister Abdul Amir al Shammari said in an interview on May 6 that the Iraqi federal government has had no security coordination with the Syrian Interior Ministry yet.[79]

Deir Ez Zor map

Iraq

Iraqi media reported that a “high-level” Shia Coordination Framework delegation will discuss multiple “key” issues with Iranian officials from May 8 to 9, including the upcoming November 2025 Iraqi parliamentary elections.[80] The Shia Coordination Framework is a loose coalition of Shia political parties, some of which Iran backs. A Shia Coordination Framework source stated that the delegation represents all Shia Coordination Framework components and is authorized to “reach an understanding with Tehran on certain [unspecified] issues of mutual understanding.”[81] Iran reportedly sent a message to Shia Coordination Framework leaders on April 30 that called on the Shia Coordination Framework to remain unified ahead of the upcoming elections. Iran’s message likely aims to increase the likelihood that Iranian-backed parties will maintain control of the Iraqi government.[82] A fragmented Shia Coordination Framework could allow smaller, less organized parties to outperform Iranian-backed parties.

Iraqi Prime Minister Mohammed Shia al Sudani and Turkish President Recep Tayyip Erdogan signed multiple memoranda of understanding (MOU) during bilateral talks in Ankara, Turkey, on May 8.[83] The MoUs focused on multiple areas, including defense manufacturing and counter-narcotics. Sudani emphasized the importance of Iraq-Turkey security and counterterrorism cooperation and welcomed efforts to disarm the Kurdistan Workers’ Party (PKK) during a press conference with Erdogan.[84] Iraq, Syria, Turkey, and Jordan agreed in February 2025 to form a strategic alliance to counter the Islamic State.[85]

Arabian Peninsula

Axis of Resistance objectives:

- Harden the Houthi regime against internal dissent in Houthi-controlled areas
- Destroy the anti-Houthi opposition in order to control all of Yemen
- Erode Israeli will to continue the war in the Gaza Strip

See topline section.

The Palestinian Territories and Lebanon

Nothing Significant to Report.

CTP-ISW will not be covering the new Israeli operation in the Gaza Strip. We have reprioritized our Middle East coverage to focus on Iran's nuclear program, Iranian domestic security, and Iranian efforts to rebuild its networks into the Levant, including the Palestinian Territories. Given that Israel

and its partners have destroyed Hamas' military organization and severed the group's ability to resupply itself, we are now focused on how Iran seeks to rebuild its lines of communication with Hezbollah and Hamas through Syria.

The Iran Update provides insights into Iranian and Iranian-sponsored activities abroad that undermine regional stability and threaten US forces and interests. It also covers events and trends that affect the stability and decision-making of the Iranian regime. The Critical Threats Project (CTP) at the American Enterprise Institute and the Institute for the Study of War (ISW) provides these updates regularly based on regional events.

CTP-ISW defines the “Axis of Resistance” as the unconventional alliance that Iran has cultivated in the Middle East since the Islamic Republic came to power in 1979. This transnational coalition is comprised of state, semi-state, and non-state actors that cooperate to secure their collective interests. Tehran considers itself to be both part of the alliance and its leader. Iran furnishes these groups with varying levels of financial, military, and political support in exchange for some degree of influence or control over their actions. Some are traditional proxies that are highly responsive to Iranian direction, while others are partners over which Iran exerts more limited influence. Members of the Axis of Resistance are united by their grand strategic objectives, which include eroding and eventually expelling American influence from the Middle East, destroying the Israeli state, or both. Pursuing these objectives and supporting the Axis of Resistance to those ends have become cornerstones of Iranian regional strategy.

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