

Iran Update



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Iran is preparing for a potential escalation with the United States by positioning military assets on key islands in the Persian Gulf and signaling its intent to target US bases, commercial shipping, and regional allies. Iranian Armed Forces General Staff (AFGS) Chief Major General Mohammad Bagheri inspected military positions in southern Iran on May 12 to prepare for a possible escalation against the United States and approved deployments of military assets to the Nazeat islands around the Strait of Hormuz.[1] Bagheri ordered the Islamic Revolutionary Guards Corps (IRGC) Navy, in coordination with local and tactical commanders, to implement a new operational plan around the Nazeat Islands to enhance missile and drone strike capabilities, fortify air defenses, and integrate advanced command and control infrastructure.[2] Bagheri explicitly stated that Iran would retaliate against US military bases, disrupt international commercial shipping, and attack regional states hosting US forces "if the US military makes a mistake." [3] The Nazeat islands—including Greater Tunb, Lesser Tunb, Abu Musa, and Siri Island—are key positions for controlling maritime access to the Persian Gulf.[4] The IRGC has recently deployed naval mines, ballistic and anti-ship cruise missiles, and fast attack craft to these islands, though it is unclear if Bagheri ordered these specific deployments.[5] AFGS-affiliated media published an article on May 13 showcasing IRGC Navy surveillance footage of the USS *Dwight D. Eisenhower* from a Mohajer-6 drone and highlighted a new underground drone hangar in Hormozgan Province, likely to signal Iranian capability to surveil and strike US naval assets.[6] Iran previously responded to the US "maximum pressure" campaign in 2019 by attacking oil tankers near the Strait of Hormuz, seizing a foreign vessel, and harassing US and British naval ships.[7] The deployments to Nazeat could enable similar activities again. These activities follow new implicit US threats, including a statement by US Special Envoy to the Middle East Steve Witkoff on May 9 that raised the possibility of renewed military action against Iran if ongoing US-Iran talks fail.[8]

Iranian officials continued to categorically reject US demands for zero uranium enrichment, which may stall US-Iran nuclear negotiations. Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi told the Parliament's National Security Commission on May 13 that uranium enrichment is Iran's "red line" and emphasized that Iran will not negotiate on missile or regional defense issues.[9] Gharibabadi warned that Iran will "see no need to continue the negotiations" if the United States continues to demand zero uranium enrichment. Gharibabadi and Deputy Foreign Affairs Minister for Political Affairs Majid Takht Ravanchi—who led the most recent round of technical talks in Oman on April 26—will likely lead Iran's technical team in future technical negotiations that will almost certainly focus on Iranian uranium enrichment levels and Iran's centrifuge stockpile.[10] Parliamentarian Ebrahim Rezaei separately stated on May 13 that

several parliamentarians called for suspending nuclear negotiations until the United States publicly recognizes Iran's right to uranium enrichment.[11] Iranian officials, including Foreign Affairs Minister and lead Iranian negotiator Abbas Araghchi and President Masoud Pezeshkian, have said that Iran will not negotiate "on the principle of enrichment itself." [12]

Iran reportedly proposed forming a regional nuclear consortium with Saudi Arabia and the United Arab Emirates (UAE) to enrich uranium at Iranian facilities, according to Western and Iranian media.[13] The consortium would return enrichment levels to 2015 JCPOA levels at 3.67 percent.[14] It would also give Saudi Arabia and the UAE access to Iranian nuclear technology. Iran previously proposed a similar consortium between Iran and the Persian Gulf states in 2007.[15] This new proposal is likely part of Iran's efforts to maintain some level of uranium enrichment.[16]

Houthi air defenses appear to have prevented US forces from establishing air supremacy over Yemen, though the Houthis did not create sufficient disruption to prevent US operations.[17] Control of the airspace is a continuum that stretches from air parity, which is when no force controls the air, to air supremacy, which is when the opposing force—in this case, the Houthis—is incapable of any effective interference with friendly air operations.[18] Air superiority, which falls between air parity and air supremacy, means a friendly force can operate without "prohibitive" interference from the opposing force.[19] The Houthis shot down seven MQ-9 Reaper drones and reportedly nearly struck an F-35 and an F-16 during the US air campaign between March 15 and May 5.[20] The Houthis probably possess the ability to shoot down F-16s. The Houthis use an Iranian-made version of the SA-6 Gainful, which other US adversaries have used to shoot down F-16s.[21] US Central Command (CENTCOM) was able to continue air operations despite this surface-to-air missile fire, and it is unclear to what degree Houthi air defenses impeded CENTCOM air operations, if at all.

A well-designed air campaign can only achieve temporary effects that must be sustained through other means. A relatively brief air campaign is unlikely to achieve long-term strategic effects like the destruction of an enemy's missile program, because the adversary can usually rebuild the assets that are destroyed in the air campaign. The Houthis can replenish their losses from the air campaign through a combination of shipments from Iran and domestic production using goods purchased on the international market, thus demonstrating the air campaign's limitations.[22]

US President Donald Trump announced that he will order the cessation of "all" US sanctions on Syria at the Riyadh Investment Forum on May 13.[23] Trump said that the United States will "tak[e] them all off" in order to give Syria a "chance at greatness." [24] US sanctions on Syria have severely limited the international community's ability to contribute to Syria's post-war reconstruction. Trump's announcement does not immediately lift US sanctions on Syria, however. The United States has levied numerous sanctions on Syria targeting the Assad regime and Iranian-backed actors in Syria since 1979, which are:

- *State Sponsor of Terrorism designation:* The United States designated Syria as a State Sponsor of Terrorism in 1979, which has restricted US foreign assistance, banned defense exports and sales, and placed controls over the export of dual-use items.[25] Trump must submit a report to Congress certifying that the Syrian government is not supporting acts of international terrorism before the proposed recession can take effect.[26]

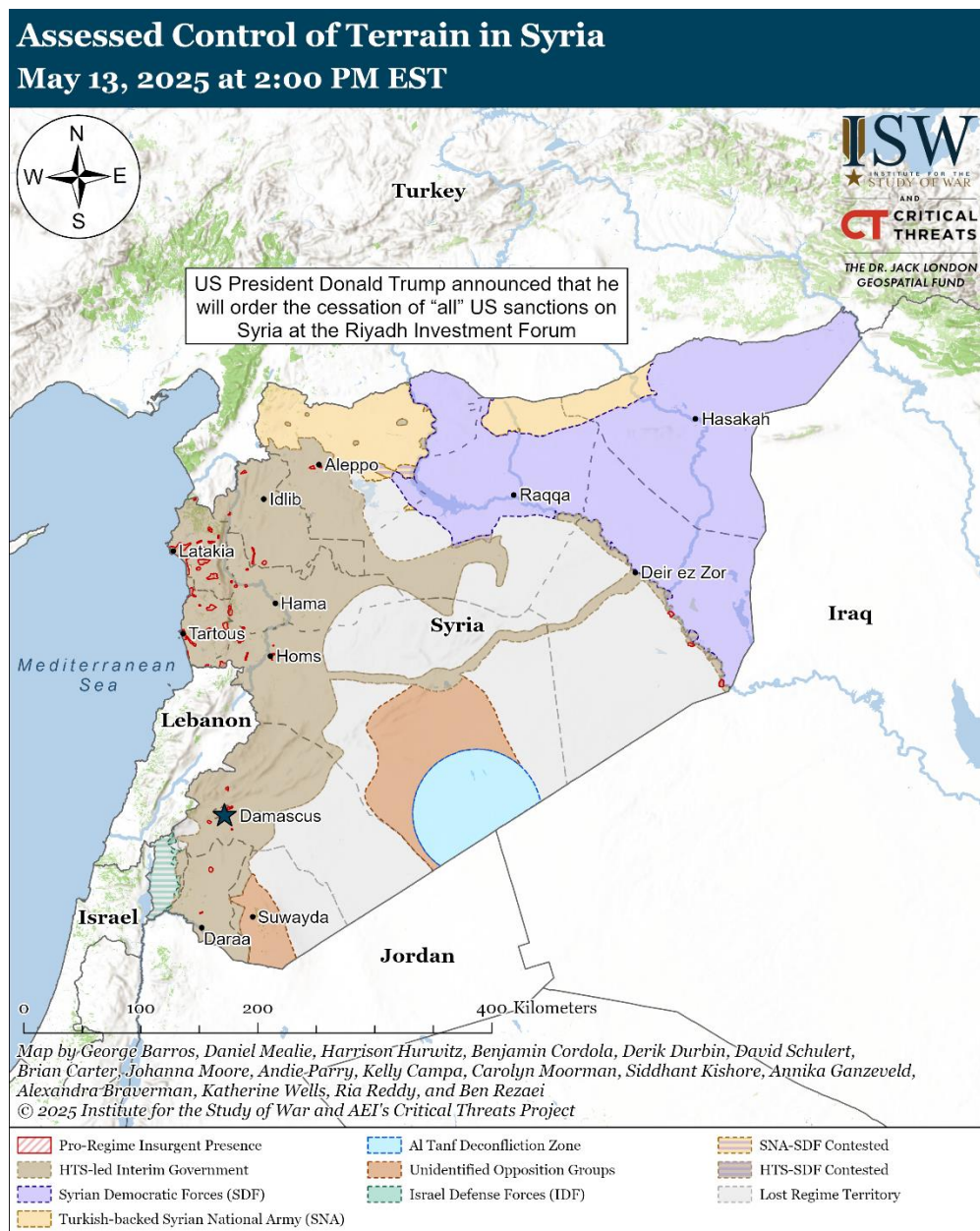
- *Sanctions by executive order:* Trump can repeal sanctions that former US presidents decreed by executive order from 2004 to 2012.[27]
- *Foreign Terrorist Organization (FTO) and Specially Designated Global Terrorists (SDGT) designations:* The United States formally designated Jabhat al Nusra—HTS's predecessor—as an FTO and SDGT in 2012 as an alias for al Qaeda in Iraq.[28] Trump and US Secretary of State Marco Rubio each have the power to revoke SDGTs and FTOs, respectively.[29] Trump did not specify whether he would lift individual SDGT designations on Syrian officials. The US State Department designated Syrian Transitional President Ahmed al Shara as an SDGT in 2013 but revoked the \$10 million bounty on Shara in December 2024 after US officials met with Shara.[30] Shara was still listed as an SDGT as of May 13.[31] The United States also listed current Interior Minister Anas Khattab as an SDGT in 2012 for his membership in al Qaeda in Iraq.[32]
- *Caesar Syria Civilian Protection Act of 2019:* The Caesar Act is the most stringent layer of UYS sanctions imposed on Syria. The Caesar Act targets anyone who provides support to the Syrian government, supports the Syrian oil and gas industry, exports aircraft or military equipment, or provides construction or engineering directly or indirectly to the Syrian government.[33] This discouraged several Gulf countries from supporting Syrian reconstruction during the early days of its transition.[34] The US Congress will need to pass a new law to repeal the Caesar Act. The US president cannot repeal the act unilaterally.

Trump did not specify on what timeline he would remove US sanctions on Syria. Trump's announcement still marks a significant inflection in US policy towards Syria, regardless of the timeline for which the sanctions will be lifted. Syrian Foreign Minister Asaad al Shaibani called Trump's announcement a "new beginning on the path to reconstruction." [35] Trump is expected to meet directly with Shara in Riyadh on May 14, according to White House-affiliated sources.[36]

Syrian President Ahmed al Shara is attempting to incentivize the Trump administration to waive sanctions by offering the United States investment opportunities in Syria. Syrian officials told Western media on May 8 that Shara reportedly wants to discuss a broad economic reconstruction plan with the United States that includes US private sector participation in all areas of Syrian reconstruction, at the exclusion of China or other powers.[37] Syrian Emergency Task Force head Mouaz Moustafa, who recently met with Shara to discuss US investment in Syria with US energy executive Jonathan Bass, said that Shara explicitly authorized envoys to propose several opportunities for US investment in Syria to Trump, including allowing a US entity to manage Syria's oil and gas resources.[38] Bass told Western media that Shara told him he wants a "Trump Tower" in Damascus.[39]

Shara's is likely offering the United States exclusive investment opportunities as a bargaining chip to convince the United States to remove sanctions because Shara will find it hard to meet all of the Trump administration's "confidence-building measures." US diplomats gave the Syrian government a list of eight demands in mid-March 2025 that Damascus would need to address before the United States would consider removing sanctions.[40] The Syrian government said that it plans to fully address most of the US demands and has taken tangible steps to do so, including forming a committee to assist efforts to find missing US citizen Austin Tice and

cracking down on Palestinian and Iranian-backed militant groups in Syria.[41] Shara is likely unwilling to act on the US condition that he bar foreign fighters from senior government positions, however. Shara has appointed several loyal foreign fighters to high-ranking positions in the Syrian government and has said that his government guarantees that foreign fighters will not pose a threat to neighboring countries.[42] Shara could calculate that a counter-proposal that reduces Russian and Chinese engagement in Syria, a key US strategic priority, could ease pressure resulting from his unwillingness to fully observe all the US conditions and still secure sanction relief on Syria. It is not clear whether the Syrian government's investment offers to the United States influenced Trump's May 13 announcement.



Key Takeaways:

- **Iranian Military Planning in the Persian Gulf:** Iran is preparing for a potential escalation with the United States by positioning military assets on key islands in the Persian Gulf and signaling its intent to target US bases, commercial shipping, and regional allies.
- **Iranian Nuclear Program:** Iranian officials continued to categorically reject US demands for zero uranium enrichment, which may stall US-Iran nuclear negotiations.
- **US Air Campaign in Yemen:** Houthi air defenses appear to have prevented US forces from establishing air supremacy over Yemen, though the Houthis did not create "prohibitive" disruption that would prevent effective US operations.
- **US Sanctions Policy in Syria:** US President Donald Trump announced that he will order the cessation of "all" US sanctions on Syria at the Riyadh Investment Forum on May 13. Syrian President Ahmed al Shara is attempting to incentivize the Trump administration to waive sanctions by offering the United States investment opportunities in Syria.

Iranian Decision-Making, Internal Dynamics, and Foreign Policy

The Iranian rial appreciated from 837,000 rials to one US dollar on May 12 to 834,500 rials to one US dollar on May 13.[43]

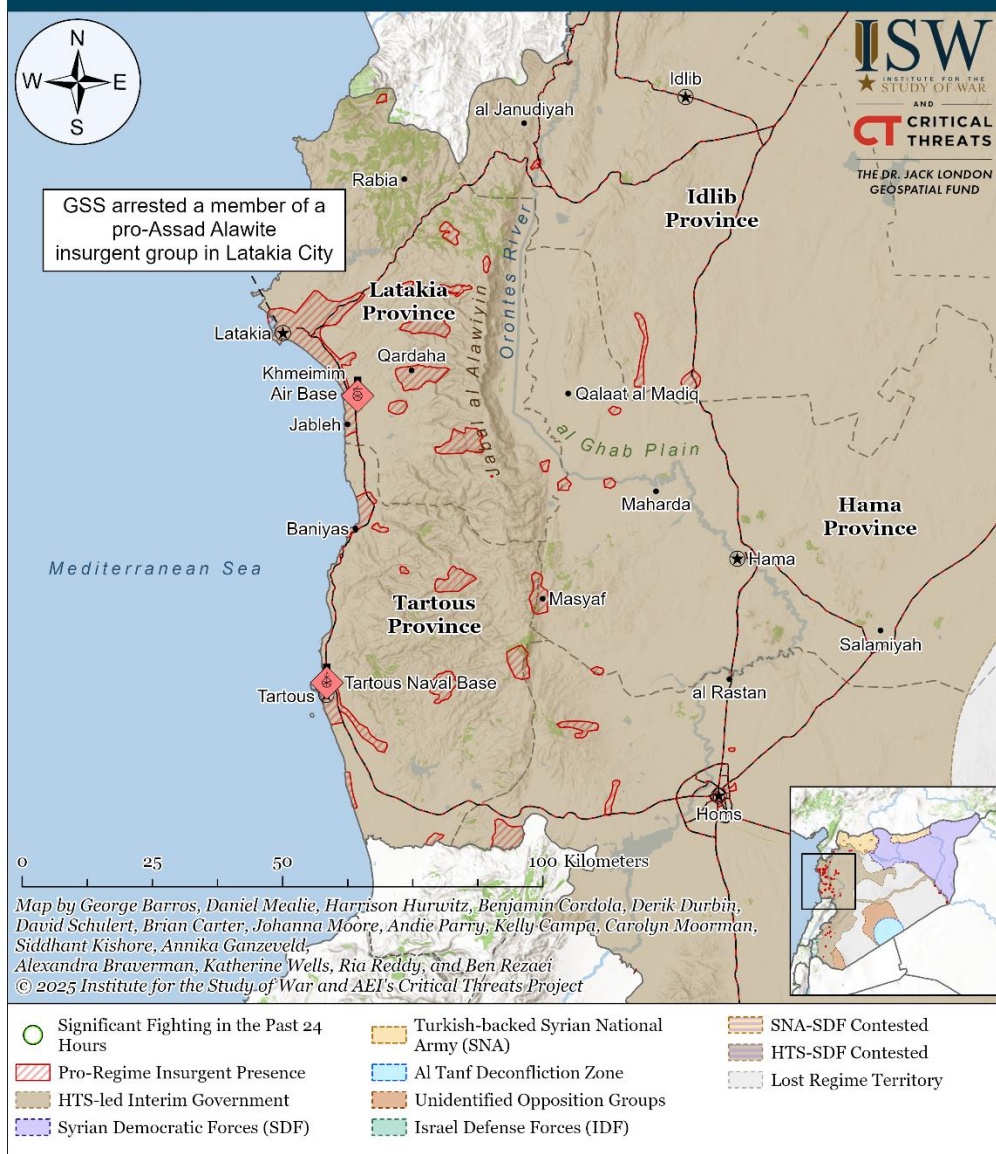
Iran is continuing to try to circumvent US sanctions targeting Iranian oil exports. The United States sanctioned several front companies on May 13 that were created by the Armed Forces General Staff-affiliated Sepehr Energy to facilitate sanctioned oil trade.[44] The front companies include several People's Republic of China-based companies, which illustrates the cooperation between US adversaries to undermine the US maximum pressure campaign.

Syria

The General Security Services (GSS) arrested a member of a pro-Assad Alawite insurgent group in Latakia City on May 12.[45] GSS forces arrested a member of the Coastal Shield Brigade, which is an Assadist insurgent group led by former Assad regime military officer Miqdad Fatiha.[46] The captured Coastal Shield Brigade fighter was involved in attacks against GSS and Syrian military positions.[47] His arrest follows a failed attack by Alawite insurgents in Tartous Province on May 9.[48] The Coastal Shield Brigade denied that the arrested fighter was a member of the brigade.[49] The Coastal Shield Brigades has frequently published false information about Assad regime elements and has framed previous extrajudicial killings targeting former regime commanders across Syria as murders against innocent civilians.[50]

Assessed Control of Terrain in Western Syria

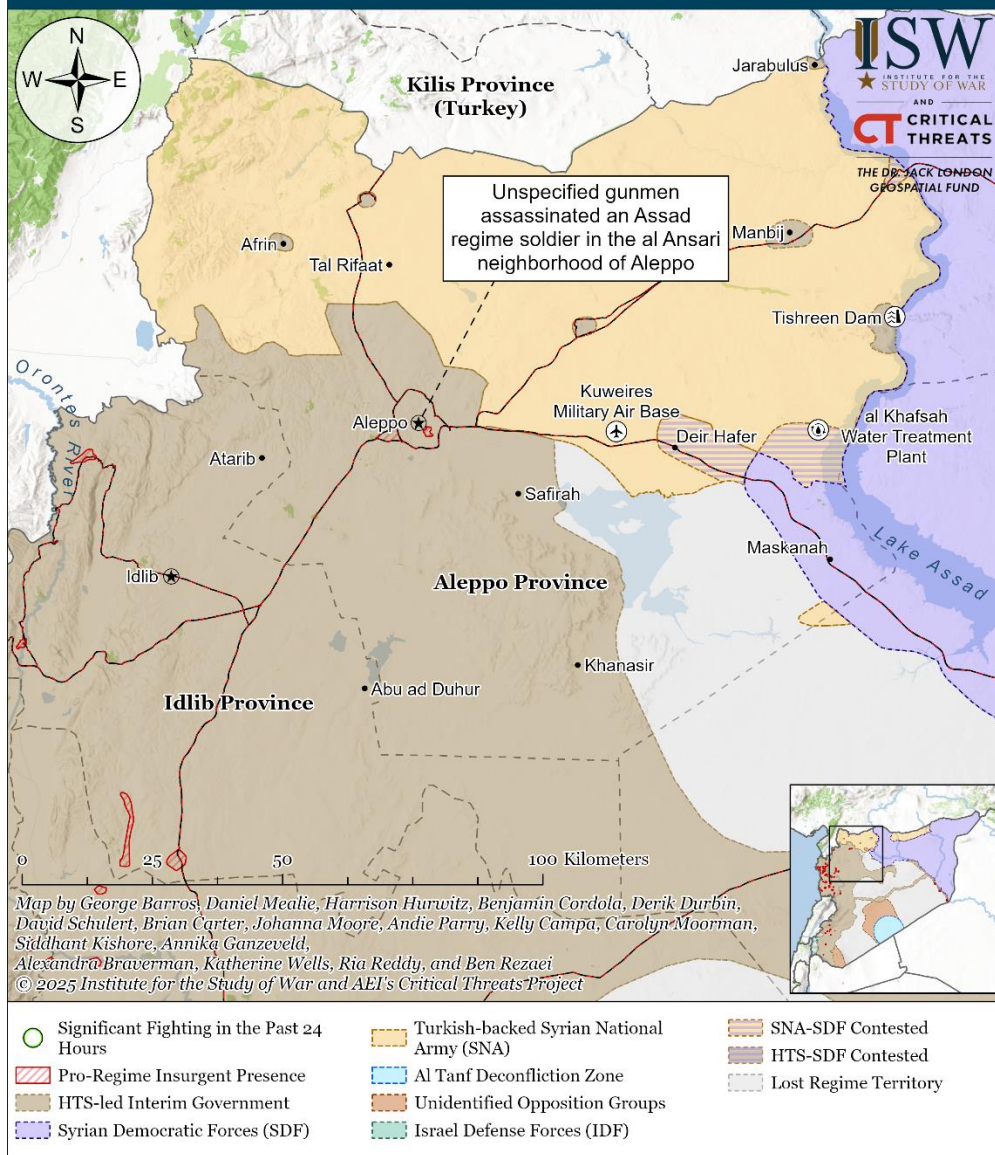
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Gunmen on motorcycles continue to conduct extrajudicial revenge killings targeting former Assadists in Syria. Unknown gunmen on motorcycles assassinated an Assad regime soldier in the al Ansari neighborhood of Aleppo City on May 13.[51] Gunmen have used motorcycles for extrajudicial killings across Syria since the fall of Assad. The GSS imposed a ban on motorcycles in high-traffic areas of Deir ez Zor City on May 13 after residents expressed concern for their safety.[52] The GSS similarly banned motorcycles in Homs City on May 4 after motorcycle-mounted gunmen conducted several sectarian killings.[53] Extrajudicial revenge killings are in part due to a lack of government-led transitional justice efforts to punish those responsible for crimes committed during the civil war, which causes vigilantes to take matters into their own hands. The motorcycle bans are a stopgap solution that address a symptom of the larger problem, which is a lack of transitional justice.

Assessed Control of Terrain around Aleppo

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Russia is likely pursuing an economic relationship with the Syrian government, which Russia can use as leverage in negotiations over Russian military presence in Syria. Syria received the majority of its approximately 61,000 barrels of oil imports per day in April from Russia.[54] Russia has provided the majority of Syrian oil imports since January 2025.[55] Iran supplied approximately 90 percent of Syria's crude oil before the fall of Assad in December 2024.[56] ISW-CTP previously assessed on March 6 that increasing Russian oil exports to Syria suggest that Russia seeks to reestablish its economic relationship with Syria, possibly to gain favor with the interim government and try to secure military basing rights in Syria.[57]

Kurdistan Workers' Party (PKK) executive committee member Murat Karayilan reiterated on May 13 that the PKK needs to see certain actions from the Turkish government before it disarms.[58] The PKK announced on May 12 that it would dissolve itself

and “end its armed struggle” after forty years of militant activity.[59] PKK-affiliated media reported on May 13 that Karayilan stated that the PKK needs to trust the Turkish government in order to disarm itself and that the group’s “first aim” is the physical freedom of imprisoned PKK leader Abdullah Ocalan.[60] Several high-ranking PKK leaders have insisted in the months leading up to the May 12 announcement that Turkey must free Ocalan from prison before the group officially disarms. This stipulation implies that the PKK may decide to retain its weapons as long as Ocalan remains in prison.[61] Karayilan said that the PKK is “displaying a genuine approach” but that the Turkish government’s current approach “does not inspire much trust.”[62] Karayilan reiterated that the PKK believes that it must end its “armed war strategy,” but that this will not be possible “in practice” without “necessary legal changes” from the Turkish government.[63]

Iraq

Nothing significant to report.

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 the topline section.

The Palestinian Territories and Lebanon

The Israel Defense Forces (IDF) may have killed Hamas leader in the Gaza Strip Mohammed Sinwar on May 13. IDF aircraft struck an underground command and control complex in Khan Younis with dozens of munitions in an operation similar to the strike that killed Hezbollah Secretary General Hassan Nasrallah in Beirut in September 2024.[64] The Hamas-run Gaza Health Ministry said the strike killed six people and injured over 40 others but did not name Sinwar in the casualty count.[65] The lack of nearby IDF troops to secure the strike area and recover Sinwar’s body will slow an official announcement of Sinwar’s death.

Gaza City Brigade Commander Izz al Din al Haddad will likely assume control over Hamas in the Gaza Strip in the event of Mohammed Sinwar’s death.[66] Haddad likely assumed a prominent leadership position in the northern Gaza Strip after Yahya Sinwar’s death due to travel and coordination challenges across the Gaza Strip.[67] Haddad’s experience as a long-time brigade commander and his probable role coordinating operations in northern Gaza will enable him to relatively smoothly assume command of Hamas’ military organization.[68]

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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