

Iran Update



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Iranian Supreme Leader Ali Khamenei expressed pessimism about the US-Iran nuclear negotiations and explicitly rejected the US demand for zero uranium enrichment.[1] Khamenei's statements are consistent with CTP-ISW's assessment that disagreements between Iran and the United States about the issue of zero uranium enrichment may stall the negotiations or delay a deal.[2] Khamenei explicitly rejected the US demand for zero uranium enrichment during a speech on May 20.[3] This speech marked the first time that Khamenei had publicly discussed the US-Iran negotiations since they started on April 12.[4] Khamenei stated that the US demand for zero uranium enrichment is "very wrong" and emphasized that Iran will "follow its own policy and method" regarding this issue.[5] Khamenei's stated position is consistent with recent statements from other senior Iranian officials.[6] Khamenei also compared the current US-Iran negotiations to previous negotiations under former Iranian President Ebrahim Raisi, stating that negotiations under Raisi never reached a conclusion and that the regime "do[es] not think they will reach a conclusion now." [7] An unspecified Iranian political insider told a UK-based outlet that there is an internal discussion in Iran "over the utility of attending further talks at this time," given the US demand for zero uranium enrichment.[8] Iranian Foreign Affairs Minister and lead negotiator Abbas Araghchi stated on May 20 that Iran has not yet accepted a proposed date for the fifth round of the US-Iran negotiations.[9]

Khamenei may have framed the US-Iran nuclear negotiations negatively to lower public expectations for a deal and imminent economic relief. Senior Iranian officials have repeatedly emphasized that the main goal of the US-Iran negotiations is to lift sanctions on Iran.[10] Iran is facing a severe economic and energy crisis amid international sanctions. Iran's economic situation has fueled public frustration, which may stoke protests that could threaten regime stability.[11] CTP-ISW previously assessed that Khamenei may calculate that engaging in nuclear negotiations with the United States will improve Iranian economic conditions.[12] The Iranian rial appreciated from a near-record low of 1,0005,500 rials to one US dollar on April 11 to 879,000 rials to one US dollar on April 14 after the first round of the US-Iran nuclear negotiations on April 12.[13] Khamenei's messaging may aim to manage domestic expectations about the possibility of a nuclear deal in an effort to protect the regime from potential internal backlash if the talks fail and Iran does not secure sanctions relief.

The Iranian Passive Defense Organization Supreme Council met on May 20, likely to coordinate preparations to protect critical infrastructure ahead of a potential US or Israeli strike.[14] The Passive Defense Organization is a government body that is responsible for planning, coordinating, and directing activities to protect civilian, military, and nuclear infrastructure from military, chemical, cyber, or economic threats.[15] The Passive Defense Organization Supreme

Council is chaired by Armed Forces General Staff Chief Major General Mohammad Bagheri.[16] Senior Iranian defense officials, including Defense and Armed Forces Logistics Minister Brigadier General Aziz Nasir Zadeh and Artesh Commander Major General Abdol Rahim Mousavi, attended the meeting.[17] Oil Minister Mohsen Paknejad notably also attended the meeting, which suggests that Iran is concerned about a potential strike on its energy infrastructure. Israeli officials reportedly considered striking Iranian oil production facilities in response to the Iranian attack on Israel in October 2024.[18]

The Houthis announced on May 19 that they will target Haifa Port in Israel in retaliation for recent Israeli airstrikes on Houthi-controlled ports in Yemen. Attacks on Haifa Port would support the Houthis' October 7 War objective to economically isolate Israel.[19]

The Houthis announced on May 19 that they will impose a “naval blockade” on Haifa Port in northern Israel in response to Israeli operations in the Gaza Strip and Israeli airstrikes in Yemen.[20] The most recent Israeli airstrikes in Yemen on May 16 targeted the Houthi-controlled Hudaydah and Salif ports, damaging berths and cargo loading infrastructure, which impeded the Houthis' ability to receive supplies through these ports.[21] The Houthi military spokesperson, Yahya Sarea, warned all shipping companies with vessels present or heading to Haifa Port that the Houthis will target the port.[22] The Houthis have conducted drone and missile attacks on Israel since October 2023 as part of a campaign to economically blockade Israel in response to its operations in the Gaza Strip. The Houthis conducted at least four joint drone and missile attacks on Haifa Port with the Islamic Resistance in Iraq in June 2024.[23] Haifa Port is an important economic gateway to the Mediterranean Sea for Israel and hosts an Israeli naval base.[24]

The Houthis are attempting to enforce this economic blockade while adhering to the terms of the US-Houthi ceasefire. The Houthis agreed on May 5 to not attack “US vessels” in the Red Sea and Gulf of Aden in exchange for the United States halting its airstrike campaign on the Houthis.[25] The US-Houthi ceasefire did not require the Houthis to stop attacks on Israel or non-US-flagged or owned merchant vessels, however.[26] The Houthis likely warned vessels near and heading to Haifa Port that the group will target the port in order to avoid striking a “US vessel” and thereby breaking the US-Houthi ceasefire agreement.

International airlines have suspended flights to Israel due to concerns about Houthi drone and missile attacks targeting Ben Gurion Airport. The suspension of flights will likely hurt the Israeli economy. At least 10 international airlines have suspended flights to Israel until mid-June 2025, according to Israeli media.[27] Several of the airlines suspended flights after Israeli air defense systems failed to intercept a Houthi missile near the airport on May 4.[28] Flight suspensions to Israel in 2024 contributed to a decline in tourism, the closure of tens of thousands of businesses, and a decrease in Israel's GDP growth forecast by half by the third quarter of 2024.[29] Flight suspensions in 2025 will likely have similar effects on the Israeli economy.

Iran is deepening high-level defense cooperation with Armenia, likely as part of a broader strategy to counter Israeli, Turkish, and Western influence in the South Caucasus. Iranian Defense and Armed Forces Logistics Minister Brigadier General Aziz Nasir Zadeh met with Armenian Defense Minister Suren Papikyan in Yerevan, Armenia, on May 20.[30] The Iranian Defense Ministry is responsible for foreign arms sales and defense agreements. Nasir Zadeh expressed support for peace talks between Armenia and Azerbaijan, stating that Iran is ready to help accelerate

the peace process between the two countries. Nasir Zadeh and Papikyan signed a Memorandum of Cooperation (MoC) between their respective defense ministries. Nasir Zadeh's visit likely reflects advanced defense talks rather than initial Iranian outreach to Armenia, given Nasir Zadeh's seniority in the Iranian regime.[31] Iran has historically maintained close ties to Armenia and has reportedly provided security assistance to Armenia in recent years. Israeli media claimed in July 2023, for example, that Armenia had used Iranian Shahed drones in its conflict with Azerbaijan.[32] Iran and Armenia recently conducted their first-ever joint military exercise in northwestern Iran on April 9 and 10 to bolster border security and counter-terrorism coordination.[33] Iran may seek to increase military and defense cooperation with Armenia in the coming months, particularly as Iran appears to be growing increasingly concerned about Israeli, Turkish, and Western influence in the South Caucasus.

Iran is simultaneously maintaining military, political, and economic ties with Azerbaijan to counter external influences in the South Caucasus. The Islamic Revolutionary Guards Corps (IRGC) Ground Forces Mirza Kuchak Khan Special Forces Brigade and Azerbaijani Special Forces began joint exercises along the Iran-Azerbaijan border on May 17. The exercises will continue until May 21.[34] The exercises included coordinated tactical drills and simulated counter-terrorism operations. Armed Forces General Staff-affiliated media framed the exercises as a strategic show of force aimed at enhancing combat readiness, expanding bilateral defense cooperation, countering Israeli "military movements," and reinforcing Iran's role in shaping regional security and stability in the South Caucasus.[35] This exercise follows a series of high-level Israeli-Azerbaijani engagements in recent weeks. Israeli government officials have recently called for including Azerbaijan in the Abraham Accords and increasing "trilateral cooperation" between Azerbaijan, Israel, and the United States.[36] US Special Envoy to the Middle East Steve Witkoff visited Baku on March 14 to discuss US-Israel-Azerbaijan trilateral coordination and strengthen ties between the three countries under the Abraham Accords framework.[37] Israeli Defense Minister Israel Katz separately met with his Azerbaijani counterpart in Israel on May 19 to discuss bolstering defense cooperation.[38] The Iranian regime has historically accused Baku of allowing Israel to use Azerbaijani territory to launch operations against Iran.[39] IRGC-affiliated media in February 2025 called the Israeli-Azerbaijani alliance a direct threat to Iranian national security and warned that Israel uses Azerbaijani territory for intelligence operations and exploiting ethnic tensions inside Iran.[40]

The European Union's (EU) and the United States' plan to lift economic sanctions on Syria in the coming weeks will help stabilize the Syrian economy, but will not address other sources of potential instability in Syria. The EU Council of Ministers lifted economic sanctions on Syria on May 20 to "help the Syrian people rebuild a new, inclusive and peaceful Syria." [41] EU High Representative for Foreign Affairs and Security Policy Kaja Kallas acknowledged that "there can be no peace [in Syria] without the path to economic recovery" but noted that the EU retains the ability to reimpose sanctions if the transitional government does not make "progress." [42] The EU can immediately lift economic sanctions on Syria, but there are several legal obstacles that the Trump administration must overcome before it can remove "all" sanctions on Syria.[43] The complicated legislative environment in the United States and decades of US sanctions targeting Syria means that it will take time for the United States to fully lift sanctions on Syria.[44] A previous temporary US sanctions waiver issued in January 2025 did not lead to significant investment in Syrian industries, partly due to confusion over what activities were included in the waiver.[45] Internal instability and uncertainty regarding Syria's future may similarly deter investment in the short- to medium-term. It

will therefore likely take weeks or months before the removal of sanctions generates visible and tangible economic effects throughout the country. Some key state functions, such as the provision of salaries to government employees, will have an immediate and important impact on parts of the Syrian population, however. [46]

Sanctions relief does not preclude the possibility of renewed internal conflict in Syria caused by other factors. Renewed internal conflict could be driven by sectarian and ethnic fears caused by the civil war. The Syrian Democratic Forces (SDF) continue to refuse to disarm because they are concerned that elements of the Turkish-backed Syrian National Army (SNA) that have previously perpetrated human rights abuses against Kurds could attack Kurdish communities.[47] Druze militia members have separately negotiated with the transitional government to keep their arms due to distrust of the transitional government's ability to protect their communities.[48] These fears can lead to renewed conflicts, such as fighting along SNA-SDF contact lines in eastern Aleppo Province or violence in Druze areas of southern Syria. These geographically limited conflicts can spread to other parts of Syria if the transitional government does not quickly and adequately address them.

The EU and the United States can continue to impose targeted individual sanctions to encourage the Syrian government to rein in the most extreme elements of its security services. Targeted sanctions could assuage minority groups' concerns about extreme elements committing abuses against their communities. The EU decided to retain its arms embargo and may impose additional targeted sanctions on individuals accused of human rights abuses.[49] Syrian President Ahmed al Shara has included some individuals in the Ministry of Defense (MoD) structure who have previously committed human rights abuses, likely because he calculates that he needs the support and cooperation of these groups to extend his control over Syria. Shara has appointed SNA commanders accused of human rights abuses, including Suleiman Shah Commander Abu Amsha and Hamza Division Commander Sayf Abu Bakr, to lead divisions of the Syrian Army.[50] Sultan Murad Commander Fahim Issa holds an even more prominent role as deputy defense minister.[51] Shara likely recognizes that ignoring these factions or attempting to subordinate them by force is too difficult for his relatively meager armed forces. Targeted sanctions may incentivize Shara to remove these powerful faction leaders or give him the political cover required to do so. The removal of destabilizing elements within the transitional government's security force could reduce the risk of renewed major internal conflict.

Key Takeaways:

- **US-Iran Nuclear Negotiations:** Iranian Supreme Leader Ali Khamenei expressed pessimism about the US-Iran nuclear negotiations and explicitly rejected the US demand for zero uranium enrichment. Khamenei's statements are consistent with CTP-ISW's assessment that disagreements between Iran and the United States about the issue of zero uranium enrichment may stall the negotiations or delay a deal. Khamenei may have framed the US-Iran nuclear negotiations negatively to lower public expectations for a deal and imminent economic relief.
- **Iranian Preparations for a Potential US or Israeli Strike:** The Iranian Passive Defense Organization Supreme Council met on May 20, likely to coordinate preparations to protect critical infrastructure ahead of a potential US or Israeli strike. The Passive Defense Organization is a government body that is responsible for planning, coordinating, and directing activities to

protect civilian, military, and nuclear infrastructure from military, chemical, cyber, or economic threats. Oil Minister Mohsen Paknejad notably also attended the meeting, which suggests that Iran is concerned about a potential strike on its energy infrastructure.

- **Houthi Campaign Against Israel:** The Houthis announced on May 19 that they will target Haifa Port in Israel in retaliation for recent Israeli airstrikes on Houthi-controlled ports in Yemen. Attacks on Haifa Port would support the Houthis' October 7 War objective to economically isolate Israel. The Houthis are attempting to enforce this economic blockade while adhering to the terms of the US-Houthi ceasefire.
- **Iranian Strategy in the Caucasus:** Iran is deepening high-level defense cooperation with Armenia, likely as part of a broader strategy to counter Israeli, Turkish, and Western influence in the South Caucasus. Iranian Defense and Armed Forces Logistics Minister Brigadier General Aziz Nasir Zadeh met with Armenian Defense Minister Suren Papikyan in Yerevan, Armenia, on May 20. The Iranian Defense Ministry is responsible for foreign arms sales and defense agreements. Iran has historically maintained close ties to Armenia and has reportedly provided security assistance to Armenia in recent years. Israeli media claimed in July 2023, for example, that Armenia had used Iranian Shahed drones in its conflict with Azerbaijan. Iran is simultaneously maintaining military, political, and economic ties with Azerbaijan to counter external influences in the South Caucasus. The Islamic Revolutionary Guards Corps (IRGC) Ground Forces Mirza Kuchak Khan Special Forces Brigade and Azerbaijani Special Forces began joint exercises along the Iran-Azerbaijan border on May 17.
- **Sanctions Relief in Syria:** The European Union's (EU) and United States' plan to lift economic sanctions on Syria in the coming weeks will help stabilize the Syrian economy, but will not address other sources of potential instability in Syria. Sanctions relief does not preclude the possibility of renewed internal conflict in Syria caused by other factors. The EU and the United States can continue to impose targeted individual sanctions to encourage the Syrian government to rein in the most extreme elements of its security services. Targeted sanctions could assuage minority groups' concerns about extreme elements committing abuses against their communities.

Iranian Decision-Making, Internal Dynamics, and Foreign Policy

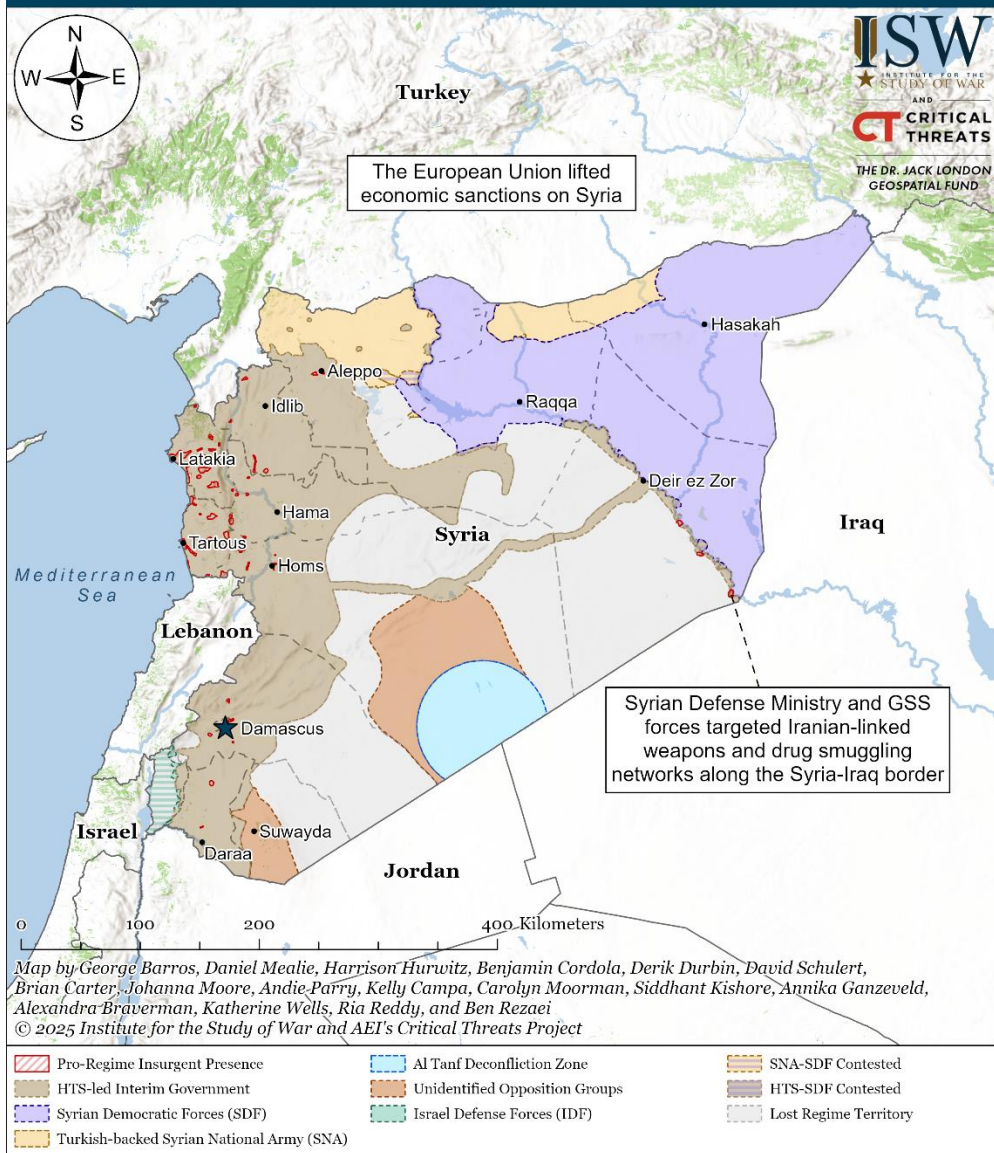
Four unspecified armed individuals kidnapped a Shia cleric in Iranshahr, Sistan and Baluchistan Province, on May 20.[52] The individuals kidnapped the cleric outside of the Amir al Momenin Seminary where the cleric worked.[53] The Iranian Law Enforcement Command (LEC) began an investigation to locate the cleric and arrest the kidnappers. No group has claimed responsibility for the kidnapping at the time of this writing.

The Iranian rial depreciated from 820,000 rials to one US dollar on May 19 to 843,000 rials to one US dollar on May 20.[54]

Syria

Assessed Control of Terrain in Syria

May 20, 2025 at 2:00 PM EST



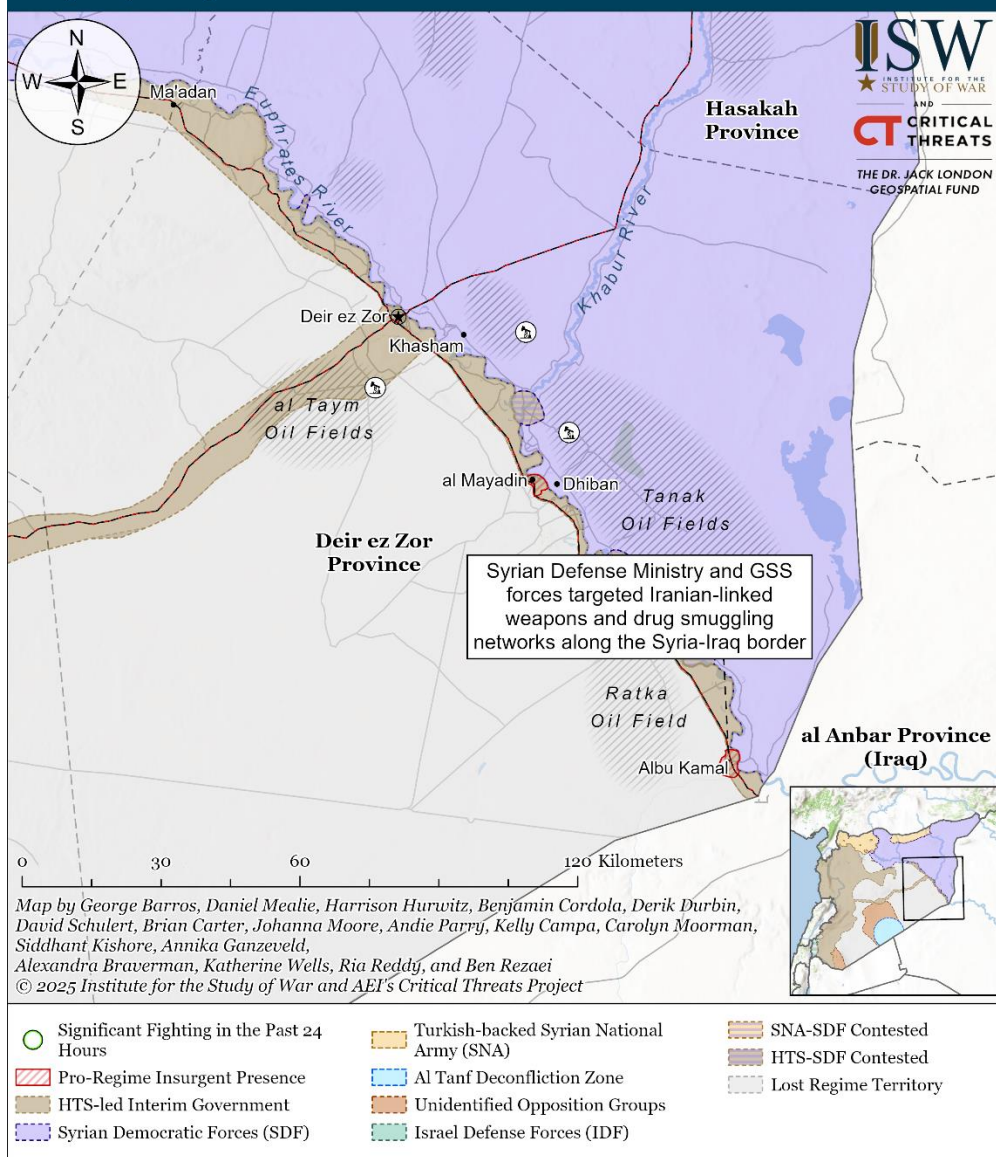
Syrian Defense Minister Marhaf Abu Qasra met with a high-level Western defense delegation for the first time on May 15, possibly to try to obtain military assistance.[55] Qasra met with UK Defense Ministry official Charles Smith in Damascus to discuss the development of the Syrian armed forces.[56] Qasra and Smith's meeting comes after the United Kingdom decided on April 24 to lift asset freezes on the Syrian Defense Ministry, Interior Ministry, and General Intelligence Directorate.[57]

Defense Minister Qasra met with the Turkish Defense Ministry's General Director for Defense, Ilkay Altindag, in Damascus on May 20.[58] Qasra and Altindag discussed enhancing military cooperation and coordination.[59] Syrian and Turkish defense officials have held several meetings since January 2025 to discuss Turkey's military presence in Syria and Turkish assistance to

the Syrian armed forces.[60] Syrian President Ahmed al Shara stated on April 23 that the Syrian government is negotiating with Turkey over the future of its military presence in Syria.[61]

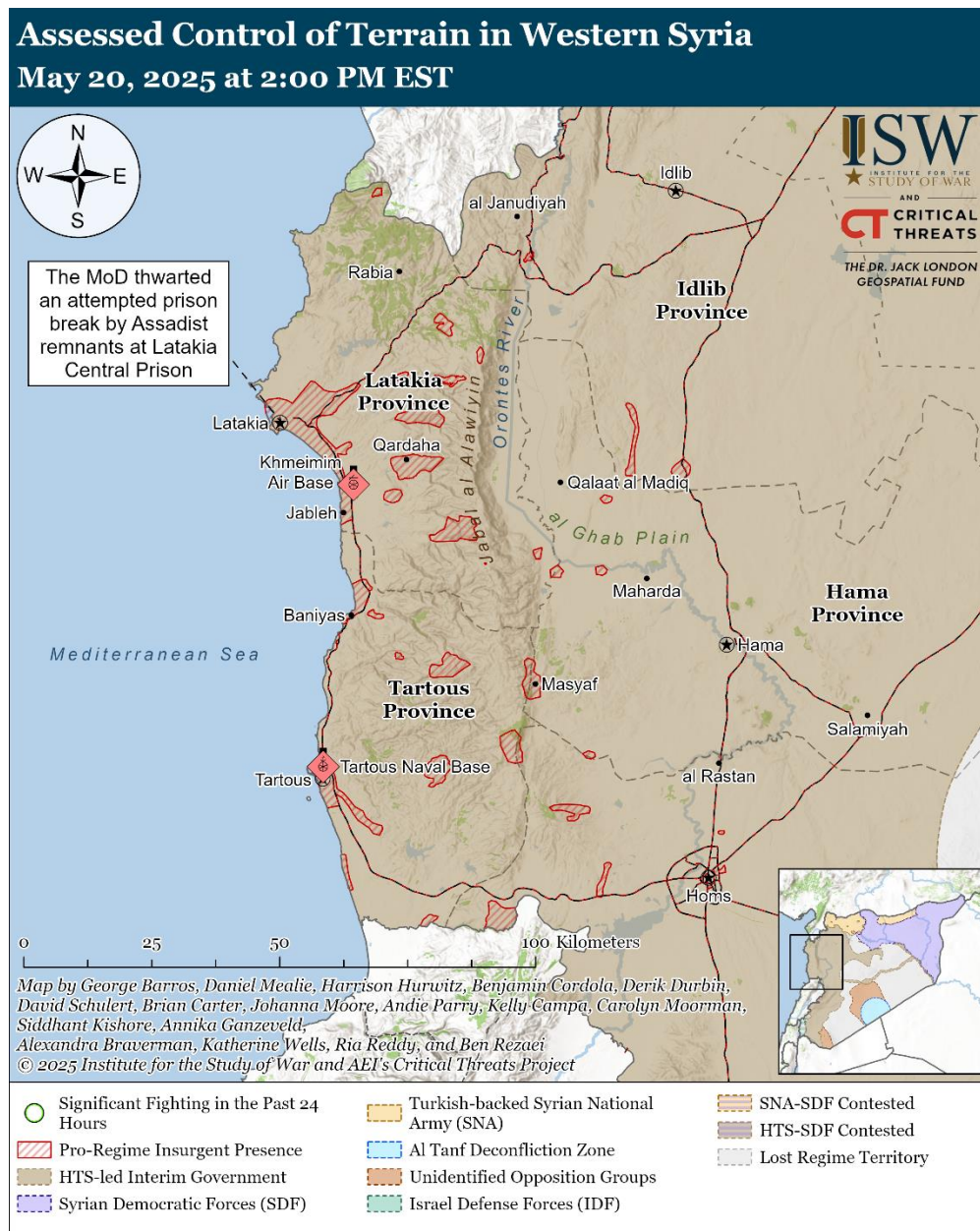
Syrian Ministry of Defense (MoD) and General Security Service (GSS) forces targeted an Iranian-linked weapons and drug smuggling network along the Syria-Iraq border on May 20.[62] Syrian forces raided several warehouses and smuggler hideouts in al Hari and Albu Kamal, Deir ez Zor Province, that were run by Ahmed Hussein Ali al Jghaifi.[63] Jghaifi reportedly facilitates smuggling operations for senior Iranian militia leaders in Iraq and Syria.[64] The forces seized large quantities of anti-tank guided missiles, thermal missiles, ammunition, machine guns, night-vision equipment, narcotic pills, and hashish.[65] Syrian media reported on May 20 that smugglers within al Jghaifi's network were transporting weapons to Lebanon and Iraq.[66] Syrian forces arrested over 35 individuals, including Jghaifi.[67] The Albu Kamal border crossing with Iraq was a key smuggling route for Iran and Iranian-backed groups under the Assad regime.[68] Syrian transitional government forces have conducted several raids in recent weeks targeting Iranian-backed smuggling networks and infrastructure along the Iraq-Syria border.[69]

Assessed Control of Terrain around Deir ez Zor May 20, 2025 at 2:00 PM EST



Syrian Foreign Affairs Minister Asaad al Shaibani met with a Jordanian delegation led by Jordanian Deputy Prime Minister and Foreign Affairs Minister Ayman Safadi in Damascus on May 20.[70] The Jordanian delegation also included the Jordanian water, transport, industry, and energy ministers.[71] Shaibani and Safadi signed a memorandum of understanding (MoU) to establish a “supreme coordination council” between the two countries.[72] The council will hold periodic meetings to strengthen coordination between the two countries.[73] The council will submit reports to Syrian President Ahmed al Shara and Jordanian King Abdullah II.[74] Safadi emphasized that Jordan will support Syria in “building a free, sovereign, stable, and secure Syria.”[75] Safadi stated that Jordan has and will continue to cooperate with Syria on defense and security issues that threaten both countries, such as drug and weapons smuggling.[76]

Safadi also stated that Jordan will coordinate with Syria to prevent further Israeli military operations in Syria and will work to facilitate the withdrawal of Israeli forces from Syrian territory.[77] Safadi claimed that Israeli attacks on Syria represent an attack on Jordan, given that attacks on Syria threaten Jordan's northern border and destabilize the entire region.[78] Shaibani reiterated Syria's call for Israel to adhere to the 1974 Disengagement Agreement, which would require Israel to withdraw from Syrian territory.[79]



Syrian MoD forces thwarted an attempted prison break by Assadist remnants in Latakia Province on May 20.[80] Assad regime remnants reportedly attempted to free prisoners from al Bassa Central Prison and clashed with MoD forces at the prison.[81] Units from the Syrian Army's 50th Division repelled the attack. Two division members sustained injuries during the attack.[82] The Assadist remnants retreated, and security forces conducted a search operation in the surrounding area

to pursue the individuals who attempted the prison break.[83] The Assad regime remnants may have sought to free Assad loyalists from the prison.[84]

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

The Houthis are seeking to acquire Chinese-made data dumping devices for their security and intelligence agencies, likely to increase their domestic surveillance capability.[85] An independent Yemeni defense outlet, citing an unspecified leaked document, claimed that the finance aide to the Houthis' domestic intelligence services chief, Majed Ahmed Salman Marai, is trying to purchase \$60,000-worth of Chinese-made data dumping devices.[86] Data dumping devices can manipulate large amounts of data and transfer data between devices.[87]

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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