

Iran Update



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Key Takeaways

- A leaked, low-confidence US intelligence assessment found that the US and Israeli strikes caused “moderate to severe” damage to Iran’s nuclear facilities, but that they did not “collapse” the facility. The destruction of the centrifuges and equipment inside does not necessarily require the collapse of the facility itself. A conclusive battle damage assessment of nuclear facilities will take time, given the buried nature of Iran’s nuclear sites and limited on-site access.
- Senior Iranian leadership suggested that Iran may not be willing to cooperate with various international organizations and treaties in the future, despite Iran’s historic and current non-adherence to such agreements.
- The Iranian regime is prioritizing regime security in the wake of the Iran-Israel War. The regime has arrested hundreds of Iranians, and it has focused its efforts on Kurdish areas.

Preliminary intelligence assessments suggest the US and Israeli strikes on Iranian nuclear facilities caused serious damage to the Fordow Fuel Enrichment Plant (FFEP).

The *New York Times* published a June 25 report on a leaked, low-confidence US intelligence assessment of the recent US strikes on the Fordow Fuel Enrichment Plant.[1] The *New York Times* and other Western media outlets cite very little direct information from the report. Unspecified sources, in their characterization of the assessment, said that the Defense Intelligence Agency (DIA) assessed that the US and Israeli strikes.[2] Unspecified officials added that the findings indicated that US bunker-buster bombs sealed entrances to two unspecified nuclear sites but failed to “collapse their underground buildings.”[3]

The destruction of the centrifuges and equipment inside does not necessarily require the collapse of the facility itself. The Institute of Science and International Security, a nuclear nonproliferation think tank that has long studied the Iranian nuclear program, assessed that it was very likely the strikes destroyed or damaged most of the centrifuges at Fordow on the basis of the impact locations and the effects of the blast waves.[4] It is notable in the context of the leaked US assessments that the Institute did not assess the damage on the basis of whether facilities “collapsed.” This is consistent with claims by other unspecified officials to the *New York Times*, who said that the Fordow, Natanz, and Esfahan nuclear facilities had all suffered “moderate to severe damage.”[5] CTP-ISW has no basis for forming an independent assessment of the damage from US and Israeli strikes at these three nuclear facilities.[6] Early Israeli assessments placed more confidence in the damage to enrichment facilities. The Israel Atomic Energy Commission separately assessed that the US strike on Fordow destroyed the site’s critical infrastructure and “rendered the enrichment facility inoperable.”[7] US President Donald

Trump told reporters on June 25 that Israeli agents concluded that Fordow suffered "total obliteration" after visiting the site, suggesting that Israeli assessments have been formed with intelligence collected by Israeli agents in Iran. [8]

A conclusive battle damage assessment of nuclear facilities will take time, given the buried nature of Iran's nuclear sites and limited on-site access. A US nuclear weapons expert stated on June 24 that US and Israeli strikes likely destroyed 20,000 centrifuges at Natanz and Fordow and severely damaged weaponization infrastructure.[9] The expert stated that the early, low-confidence assessment "focused too narrowly" on breakout timelines.[10] Breakout refers to the time required to enrich 90 percent enriched uranium (also known as weapons-grade uranium). Weaponization requires one to build nuclear weapons. Axios reported on June 25 that intercepted communications suggested Iranian military officials have delivered false situation reports to senior Iranian leaders to downplay the extent of the damage, citing an unspecified Israeli source.[11] This fact is notable because the leaked US intelligence assessment reportedly relied in part upon signals intelligence.[12]

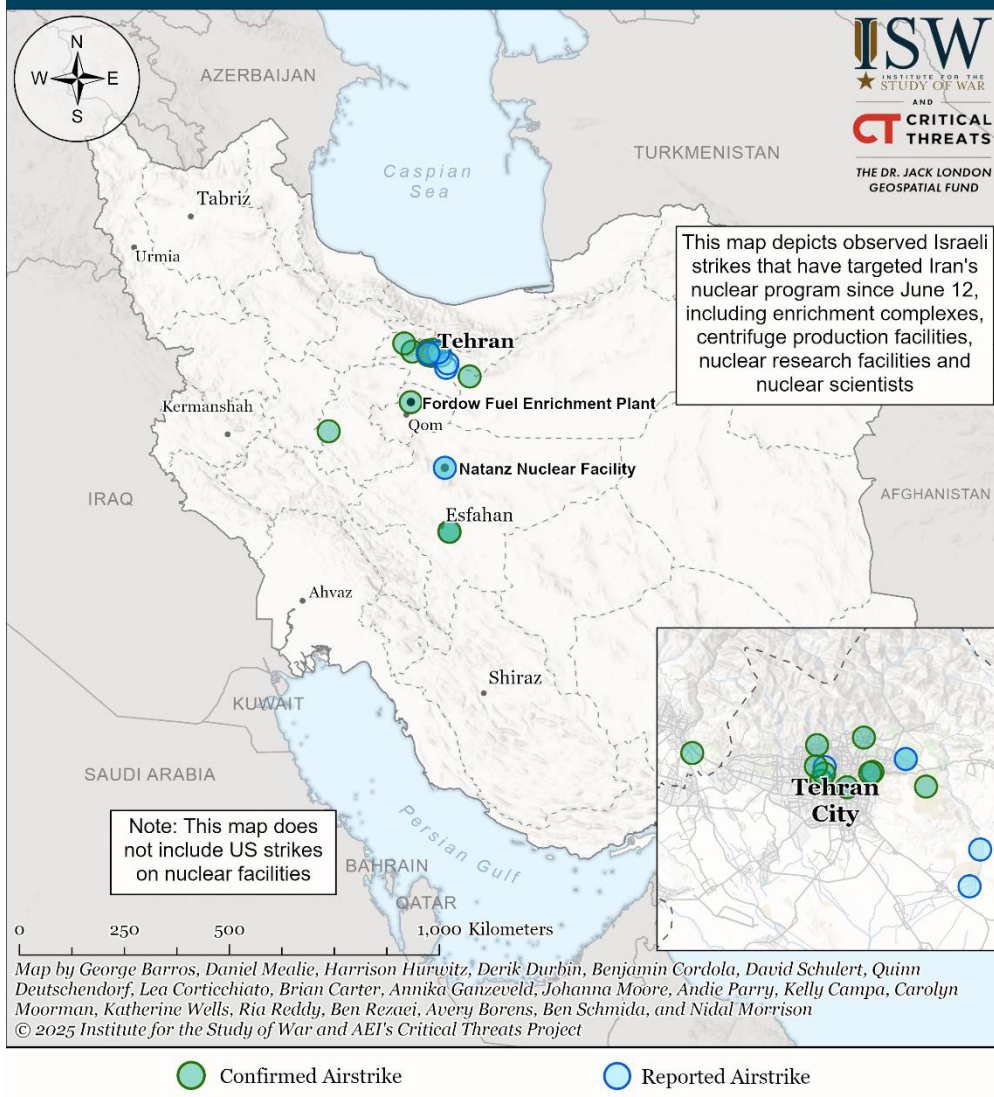
US Strikes on Nuclear Facilities in Iran June 21, 2025



TLAM Cruise Missiles

GBU-57/MOP

Israeli Strikes Targeting the Iranian Nuclear Program June 12 to June 24, 2025



Senior Iranian leadership suggested that Iran may not be willing to cooperate with various international organizations and treaties in the future, despite Iran's historic and current non-adherence to such agreements. Iranian Foreign Affairs Minister Abbas Araghchi and other senior Iranian officials have suggested in recent days that Iran may reconsider its stance on the Nuclear Non-Proliferation Treaty (NPT).[13] Araghchi stated that the agreement “failed” to protect Iran’s nuclear program despite years of Iran’s compliance with the NPT.[14] A May 2025 International Atomic Energy Agency (IAEA) NPT Safeguards Agreement report found Iran’s cooperation with the IAEA “less than satisfactory” and raised concerns about undeclared Iranian nuclear sites and material.[15] Iran has threatened to withdraw from the NPT repeatedly over the past several years, but has not done so yet.[16]

Iranian parliament passed a bill on June 25 to suspend all cooperation with the IAEA.[17] Iran’s parliamentary national security committee claimed on June 24 that the May 2025 IAEA report that

accused Iran of failing to cooperate was inaccurate and served as a pretext for the Israeli air campaign.[18]The committee's June 24 statement recommended that Iran suspend cooperation with the IAEA.[19] Iran has already restricted IAEA oversight, including by withdrawing the certifications of several inspectors in September 2023 and barring other top inspectors in November 2024.[20] Iranian parliamentary speaker Mohammed Bagher Ghalibaf stated that Iran could resume cooperation with the IAEA following a report from Iran's Atomic Energy Authority and the national security and foreign affairs committee.[21] The June 25 bill must be approved by Iran's Guardian Council, whose members are appointed by the Iranian Supreme Leader, to be entered into law.

The head of Iran's Atomic Energy Organization, Mohammed Eslami, stated on June 24 that Iran is assessing the damage to its nuclear program and planning to resume operations.[22] Israel destroyed Iranian nuclear facilities and enrichment capacity with US support and killed key nuclear scientists who were critical to the development and weaponization of Iran's program. The Institute for Science and Security assessed that US and Israeli airstrikes on Iran have "effectively destroyed" Iran's enrichment program and that it will take a "long time" for Iran to restore its enrichment capabilities to pre-strike levels.[23] IRGC Major General Mohsen Rezaei stated during an interview on June 19 that Iran relocated its enriched material to a secure location to prevent it from being destroyed.[24] The Institute stated that Iran still retains stockpiles of 3 to 5 percent, 20 percent, and 60 percent enriched uranium.[25] The destruction of Iran's enrichment capabilities will make enriching uranium from 60 percent to 90 percent much slower, however.

Trump stated on June 25 that the United States would not allow Iran to rebuild its uranium facilities and that he would be willing to strike Iran again to prevent it from doing so.[26] The United States and Iran have maintained their negotiating positions from before the conflict on Iranian uranium enrichment. Iranian Vice President Mohammed Reza Aref reiterated on June 25 that Iran will not negotiate on Iran's right to enrich uranium on Iranian territory.[27] The United States has maintained its demand for Iran to maintain zero uranium enrichment capabilities.[28] The United States and Iran are expected to meet the week of June 29 to discuss a potential nuclear deal.[29] US President Donald Trump suggested that a nuclear deal with Iran may not be necessary due to damage inflicted on the nuclear program.[30]

The Iranian regime has taken steps to securitize the country, which likely reflects the regime's paranoia about Israeli infiltration and signals a shift to prioritization of counterintelligence. Iranian media reported that Iranian security forces have arrested at least 700 Iranians on political or security charges since the start of the Israel-Iran War on June 12.[31] The arrests include several individuals whom the regime characterized as "Mossad spies." [32] Such arrests likely reflect Iranian recognition of the scale of Israeli infiltration and covert operations in Iran, which was revealed during Israel's opening attacks on Israel. Three Iranian senior officials told Reuters that Iran is concerned about internal unrest, especially in Kurdish areas, and Islamic Revolutionary Guards Corps (IRGC) and Basij units have been put on alert.[33] One source said Iranian forces have deployed to Iran's borders with Pakistan, Iraq, and Azerbaijan to prevent the infiltration of "terrorists." [34] Large Iranian Kurdish separatist factions said that Iranian authorities have arrested several members of the Kurdish groups.[35] A member of the Democratic Party of Iranian Kurdistan--one of several large Iranian Kurdish separatist factions--said IRGC units deployed to schools in Kurdish areas of Iran and conducted house searches for suspects and weapons following Israeli airstrikes in Iran on June 12.

Iranian Supreme Leader Ali Khamenei recently appointed Brigadier General Mohammad Karami as the IRGC Ground Forces commander, which further illustrates the regime's concerns about potential domestic unrest, given that Karami was previously involved in suppressing internal dissent.[36]

Iran's efforts to securitize the country (and the particular focus on Kurdish areas) may reflect the regime's concerns that Israel could exploit instability in Kurdish or minority areas to further infiltrate Iran. The Iranian regime has historically been concerned about unrest in Kurdish-dominated areas of northwestern Iran. A significant portion of the protests during the Mahsa Amini Protest movement in December 2022 occurred in cities in Tehran, Esfahan, Kurdistan, and West Azerbaijan provinces.[37] Kurdistan and West Azerbaijan provinces have a large Iranian Kurdish population that resonated with the protest movement. The recent arrests were reportedly concentrated in Kermanshah, Esfahan, Khuzestan, Fars, Lorestan, and Tehran provinces.[38] Iran has historically also accused Kurdish opposition groups and Israel of using Iraqi Kurdistan to facilitate operations into Iran. Iranian state media accused Kurdish opposition groups of helping Israel smuggle military equipment into Iran that Israel used in its January 2023 drone attack on a munitions factory in Esfahan, for example.[39]

IRGC-affiliated media confirmed on June 25 that the newly appointed Khatam ol Anbia Central Headquarters Commander Major General Ali Shadmani died of his wounds from an Israeli airstrike in central Tehran.[40] The IDF announced that it killed Shadmani on June 17.[41] Supreme Leader Ali Khamenei appointed Shadmani to command the headquarters after the IDF killed former Khatam ol Anbia Central Headquarters Commander Major General Gholam Ali Rashid on June 13.[42] Khatam ol Anbia Central Headquarters is one of two entities the Khamenei relies on to command, control, and coordinate Iran's three military branches.[43] It is responsible for joint and wartime operations.[44]

Iranian Defense Minister Aziz Nasirzadeh arrived in the People's Republic of China (PRC) on June 25 in his first foreign visit since Israel began its air campaign on Iran.[45] Nasirzadeh will attend a two-day meeting for the defense ministers of the Shanghai Cooperation Organization (SCO) countries in Qingdao.[46] Iran's strategic economic and defense ties with the PRC may offer a modicum of future relief for Iran as it attempts to rebuild military and economic infrastructure in the coming days and months. PRC-based entities have historically provided military or dual-use products to Iran, including shipping precursor material to support the replenishment of Iranian solid-fuel ballistic missile stockpiles.[47] The PRC also offers a critical economic lifeline for Iran by purchasing around 90 percent of Iran's oil exports, and Iranian officials are likely eager to secure Iran's economic partnership with the PRC in the aftermath of Israel's recent strike campaign.[48] Nasirzadeh's visit to the PRC follows recent reports that Iran has been unsatisfied with recent support from Russia during the Israel-Iran war.[49] Foreign Affairs Minister Abbas Araghchi met with Russian President Vladimir Putin in Moscow on June 23, reportedly to request Russian assistance for Iran via a delivered letter from Supreme Leader Ali Khamenei.[50]

The Houthis likely launched a drone targeting Israel on June 25, which is consistent with the Houthi drone and missile campaign that has targeted Israel in support of Gaza since November 2023. The IDF intercepted a drone that was "likely launched" from Yemen before it crossed into Israeli territory on June 25.[51] The Houthis have launched hundreds of drones and

ballistic missiles targeting Israel since the Houthis began their campaign to enforce an economic blockade on Israel in November 2023.[52] The Houthis continued to attack Israel with several ballistic missiles and drones during the recent 12-day conflict in support of Iran.[53] The Houthis claimed that at least one of these attacks was conducted in coordination with Iran, though CTP-ISW has not observed evidence of this coordination.[54] The Houthis conducted their most recent drone attack on June 25 after the Israel-Iran ceasefire went into effect. Houthi spokesperson Mohammed al Bukhaiti told the *Wall Street Journal* on June 24 that the group "is [not] bound by" the Israel-Iran ceasefire and that its military operations against Israel would continue "until the aggression in Gaza stops." [55]



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