

Iran Update



Katherine Wells, Ria Reddy, Avery Borens, Ben Schmida, Ben Rezaei, Henry Jenks, and Annika Ganzeveld

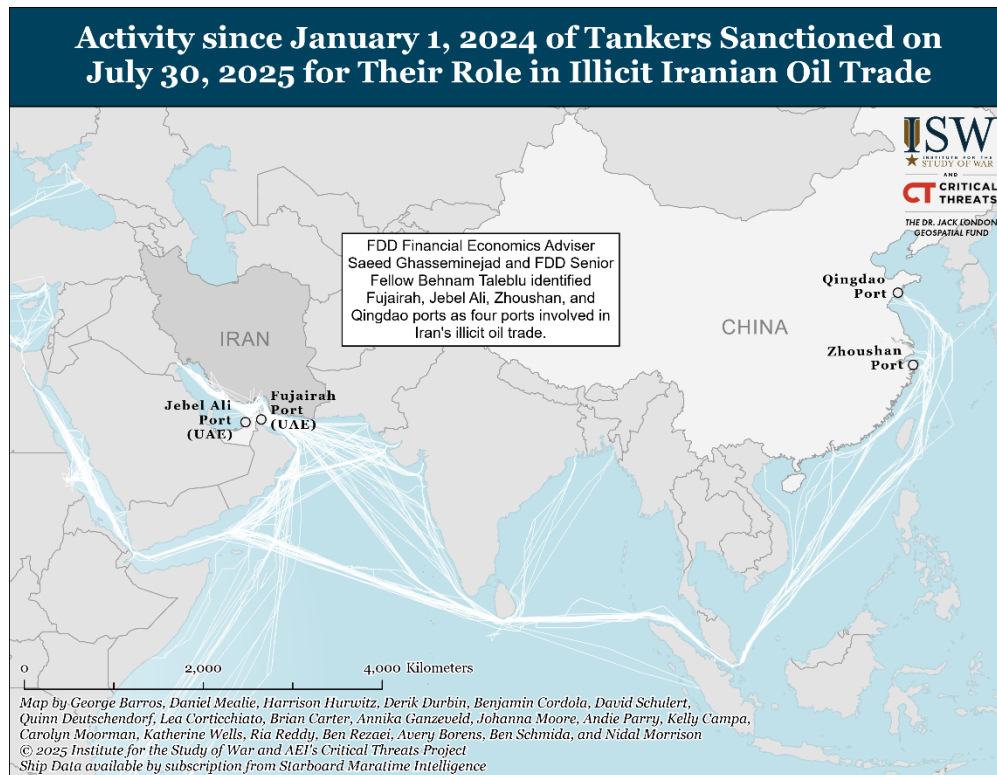
Information Cutoff: 2:00 PM ET

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 daily.

The United States sanctioned Senior Supreme Leader Adviser Ali Shamkhani's son, Mohammad Hossein Shamkhani, and his multinational shipping network on July 30 for generating tens of billions of dollars in revenue for the Shamkhani family and the Iranian regime.[1] The US Treasury Department sanctioned 12 individuals, 52 vessels, and 53 entities, including 15 shipping firms, tied to Hossein Shamkhani's network to disrupt Iranian and Russian exports of petroleum products and other goods.[2] Hossein Shamkhani manages a fleet of oil tankers and containerships through several UAE-based companies.[3] One of the companies is involved in shipping missiles, drone components, and dual-use goods from Iran to Russia to support Russia's war in Ukraine in exchange for Russian oil.[4] The European Union recently sanctioned Hossein Shamkhani on July 21 for facilitating Russian oil trade.[5] Hossein Shamkhani's network has employed sophisticated tactics to evade previous international sanctions on his network.[6] These tactics include frequently changing vessel operators and managers to obscure ownership, falsifying cargo information, creating subsidiary companies in offshore jurisdictions, and turning off automatic identification systems (AIS) during loading. Iran's ghost fleet vessels frequently turn off their AIS and use falsified documents to transfer Iranian oil.[7] Hossein Shamkhani and his sanctioned associates also use aliases and international passports to bypass financial restrictions in the international banking system.[8] The network has laundered oil revenues through Emirati companies.[9] US Treasury Secretary Scott Bessent noted that these sanctions are the largest action that the US Treasury Department has taken against Iran since US President Donald Trump reinstated his "maximum pressure" campaign on Iran in February 2025.[10]

The United States sanctioned the Zhoushan Jinrun Petroleum Transfer Company, which is located at Zhoushan Port, Zhejiang Province, China, on July 30 for receiving at least six Iranian crude oil shipments.[11] At least three oil tankers and 18 cargo ships that the United States sanctioned on July

30 have visited Zhoushan Port since January 2024, according to commercially available maritime data. Zhoushan Port is one of several ports that Foundation for Defense of Democracies Financial Economics Adviser Saeed Ghasseminejad and Senior Fellow Behnam Ben Taleblu identified on July 30 as being involved in Iran's illicit oil trade.[12]

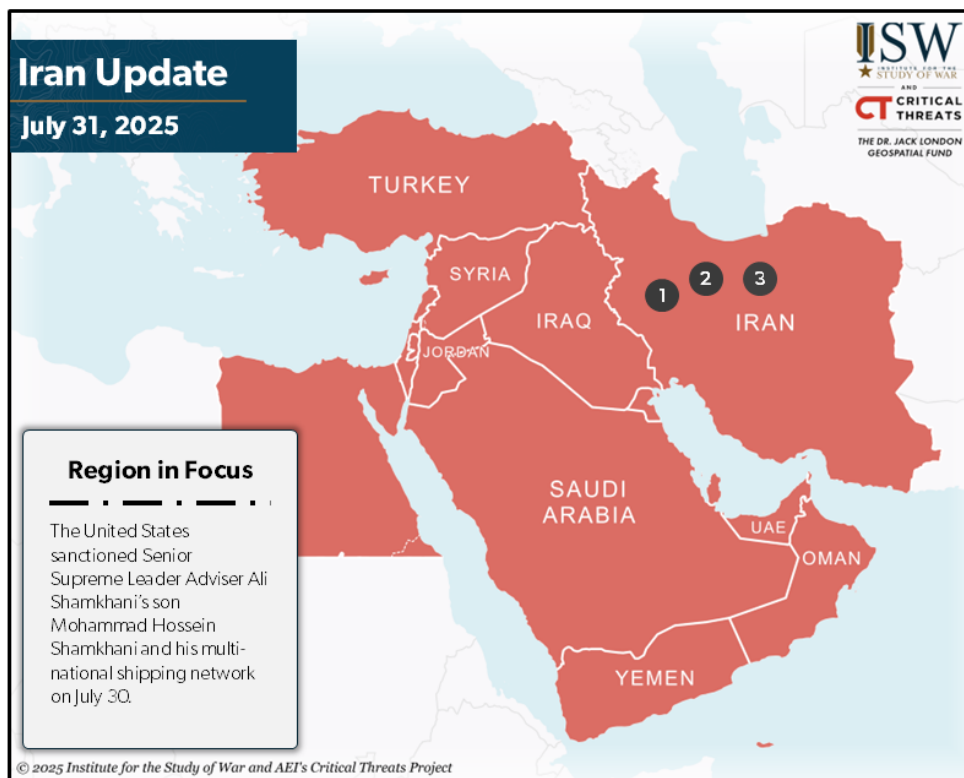


Iran increased crude oil exports from 1.7 million barrels per day (bpd) in June 2025 to 1.8 million bpd in the first half of July 2025, according to data reviewed by Ghasseminejad and Taleblu on July 30.[13] Ninety-two percent of Iranian crude oil exports in June went to China, including to Zhoushan and Qingdao ports, while 6 percent of Iranian crude oil exports in June went to the United Arab Emirates (UAE), including to Fujairah and Jebel Ali ports, according to the data. China imported more than 1.8 million bpd between June 1 and 10, according to Vortexa.[14] Another firm that tracks Iranian oil tankers reported that Iranian oil exports to China, including petroleum products and condensates, reached 1.46 million bpd on June 27.[15] Iranian oil exports to China likely decreased in the second half of June due to the 12-day Israel-Iran War. Iranian oil exports still increased in June from around 1 million bpd in May, however.[16]

Iranian outlet Nour News posted on X on July 30 that there will likely be "imminent changes" in high-ranking Iranian security institutions after "necessary...structural reforms have been implemented." [17] Nour News has historically been affiliated with the Supreme National Security Council (SNSC) broadly, but has recently increasingly aligned itself with former SNSC Secretary Ali Shamkhani. Other Iranian media outlets widely recirculated this announcement but did not provide further details.[18] This post notably comes after Nour News published an op-ed on July 29 calling on the Iranian regime to alter its internal and external strategy following the 12-day Israel-Iran War.[19] The op-ed proposed the creation of a "Strategic Command

Center" to coordinate between "security, economic, and diplomatic centers" and develop rapid responses to evolving threats.[20] The center would reportedly "eliminate parallel institutions, improve transparency, and reduce inter-organization frictions."[21]

Some Iranian media outlets and social media users have speculated that the announcement from Nour News could be referring to Supreme Leader Adviser Ali Larijani's possible appointment as SNSC secretary.[22] CTP-ISW cannot verify these claims. Some Iranian media outlets have speculated in recent weeks that Larijani may be appointed as the next SNSC secretary.[23] Larijani previously served as SNSC secretary from 2005 to 2007.[24] Ali Akbar Ahmadian has served as the SNSC secretary since May 2023.[25] A political activist reportedly close to Larijani told Iranian media on July 30 that he "does not rule out the possibility" that Larijani may be appointed SNSC secretary.[26] He stated that Larijani and President Masoud Pezeshkian have a close relationship.[27] The Iranian president appoints the secretary of the SNSC.[28] A reformist outlet also suggested on July 24 that Larijani may be appointed as SNSC secretary.[29] The outlet praised Larijani as an effective, trusted, and moderate leader. Another reformist outlet similarly highlighted that Larijani has historically aligned with the pragmatists within the Iranian hardline faction.[30] These characterizations of Larijani as a "moderate" official are consistent with reports that Larijani tried to contact Supreme Leader Ali Khamenei during the Israel-Iran War to advocate for a ceasefire.[31] Speculation about Larijani's potential appointment as SNSC secretary comes amid reports that Larijani's recent activities, including his visit to Russia on July 20 to discuss nuclear negotiations, signal a renewed effort by moderate and pragmatic factions in the regime to reassert influence over Iran's domestic and foreign policy after the war.[32] Iranian media has recently characterized Larijani's recent activities as his "return to the center of gravity of [Iran's] official politics."[33]



- 1 **Iran.** The United States sanctioned the Zhoushan Jinrun Petroleum Transfer Company, which is located at Zhoushan Port, Zhejiang Province, China, on July 30 for receiving at least six Iranian crude oil shipments. At least three oil tankers and 18 cargo ships that the United States sanctioned on July 30 have visited Zhoushan Port since January 2024.
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- 3 **Iran.** Iranian outlet Nour News posted on X on July 30 that there will likely be "imminent changes" in high-ranking Iranian security institutions after "necessary. . . structural reforms have been implemented." Some Iranian media outlets and social media users speculated that this announcement from Nour News could be referring to Supreme Leader Adviser Ali Larijani's possible appointment as SNSC secretary.

Key Takeaways

- **US Sanctions against Iran:** The United States sanctioned Senior Supreme Leader Adviser Ali Shamkhani's son, Mohammad Hossein Shamkhani, and his multinational shipping network on July 30 for generating tens of billions of dollars in revenue for the Shamkhani family and the Iranian regime. The US Treasury Department sanctioned 12 individuals, 52 vessels, and 53 entities tied to Hossein Shamkhani's network to disrupt Iranian and Russian exports of petroleum products and other goods.
- **Iranian Crude Oil Exports:** Iran increased its crude oil exports from 1.7 million barrels per day (bpd) in June 2025 to 1.8 million bpd in the first half of July 2025, according to data reviewed

by Foundation for the Defense of Democracies Financial Economics Adviser Saeed Ghasseminejad and Senior Fellow Behnam Ben Taleblu.

- **Iranian Domestic Politics:** Iranian outlet Nour News posted on X on July 30 that there will likely be “imminent changes” in high-ranking Iranian security institutions after “necessary... structural reforms have been implemented.” Some Iranian media outlets and social media users speculated that this announcement could be referring to Supreme Leader Adviser Ali Larijani’s possible appointment as SNSC secretary.

Iran

Iran continues to maintain maximalist demands, including its right to domestic uranium enrichment, which makes it very unlikely that Iran will accept a nuclear deal with the United States that includes a zero-uranium enrichment demand. Iranian Foreign Affairs Minister Abbas Araghchi stated in an interview with the *Financial Times* on July 31 that the United States “must agree to compensate” Iran for damages it incurred during the Israel-Iran War.[34] Araghchi further demanded that the United States explain why it struck Iran during nuclear negotiations and assure Iran that it will not attack Iran again.[35] Araghchi exchanged messages with US Special Envoy to the Middle East Steve Witkoff during and after the war and has reportedly told Witkoff that the path to negotiations is possible but remains “narrow.”[36] Unspecified Western diplomats told Israeli media on July 30 that the E3 (the United Kingdom, France, and Germany) officials left the July 25 Iran-E3 meeting frustrated and stated that “there is little room for progress” if Iran maintains its right to domestic uranium enrichment.[37] The E3 has repeatedly warned that it may trigger the Joint Comprehensive Plan of Action (JCPOA) snapback mechanism if Iran does not resume nuclear negotiations with the United States and produce “concrete results” in the negotiations by the end of August.[38]

Reformist outlet Ensaf News reported on July 31 that an unspecified member of President Masoud Pezeshkian’s administration recently met with former Iranian Prime Minister and key leader of the 2009 Green Movement Mir Hossein Mousavi “on behalf of Pezeshkian.”[39] The 2009 Green Movement was a mass protest movement in Iran that emerged after the disputed June 2009 presidential election, with demonstrators demanding political reform and protesting against electoral fraud.[40] Iranian Vice President for Executive Affairs Mohammad Jafar Ghaem Panah stated that the meeting between the unspecified government official and Mousavi indicates Pezeshkian’s willingness to lift Mousavi’s house arrest, which he stated is a “demand of part of the people.”[41] The meeting comes after Pezeshkian stated on July 22 that his administration is ready to engage “fairly and justly” with the “opposition.”[42] Mousavi called on July 11 for a referendum to establish a constitutional assembly as a “means to reclaim national sovereignty,” framing the current Iranian governance system as unrepresentative of the Iranian people.[43]

Iraq

Nothing significant to report.

Syria

Senior Syrian political and defense officials met with Russian officials in Moscow for the first time on July 31 to discuss bilateral economic cooperation and are likely to continue negotiations over Russian basing rights in Syria.[44] Syrian Foreign Minister Asaad al Shaibani met with Russian Foreign Minister Sergei Lavrov. Lavrov stated that Russia is willing to support Syrian reconstruction and review Assad-era “agreements and contracts.”[45] Syrian Defense Minister Marhaf Abu Qasra and General Intelligence Service Director Hussein Salameh separately met with Russian Defense Minister Andrey Belousov to discuss “cooperation between defense ministries and the situation in the Middle East,” which likely refers to Russian bases in Syria.[46] Lavrov thanked Syrian authorities for ensuring the security of Russia’s two military bases in Syria.[47] The Russian government invited Syrian President Ahmed al Shara to Moscow in October 2025 to attend the Arab-Russian Summit.[48] Russia and the Syrian transitional government have engaged in negotiations about the status of Russian bases in Syria since January 2025.[49] Russian forces remain present at Hmeimim Airbase in Latakia Province and a naval base in Tartous.[50] Russian forces have reportedly returned to a helicopter base in Qamishli, Hasakah Province, after evacuating the base following the collapse of the Assad regime.[51] Russian Deputy Foreign Minister Sergei Vershinin previously suggested in May 2025 that Russia was continuing to negotiate with the Syrian government about the status of Russian military bases in Syria.[52]

The Syrian Ministry of Finance announced on July 31 that “outlaw groups” robbed money intended for public servant salaries in Suwayda Province, which demonstrates the lack of rule of law in this province following the announcement of the July 18 ceasefire agreement.[53] “Outlaw groups” robbed the state-owned Syrian Commercial Bank in the town of Shahba, Suwayda Province, on July 31.[54] The Syrian government and Druze militias agreed to a three-phase ceasefire on July 18, which is currently in the second phase. This phase includes the evacuation of civilians, the delivery of aid, and the restoration of basic services in Suwayda Province.[55] Druze militias have become responsible for security and the distribution of government services throughout the province since the ceasefire’s announcement.[56] The third phase of the July 18 ceasefire mandates that internal security personnel will deploy to Suwayda Province and that state institutions in the province will reopen, although it is unclear when this phase will be implemented.[57]

The Syrian Ministry of Justice (MoJ) announced on July 30 that it has received cases from the Ministry of Interior to prosecute former Assad regime officials accused of war crimes.[58] MoJ officials reviewed several cases and submitted public lawsuits against multiple prominent Assad regime officials.[59] MoJ judges will first review the lawsuit against General Atef Najib, Bashar al Assad’s cousin.[60] General Najib previously served as the Daraa Province political security commander and was accused of torturing children, which sparked the first anti-Assad protests in Daraa City in 2011.[61] This announcement comes amid significant reform to the Syrian judicial system, including the removal of Assad-era judges.[62]

Arabian Peninsula

The Houthis launched five drones targeting an unspecified “military site in Ashkelon and two “sensitive” sites in Tel Aviv and the Negev Desert in southern Israel on July 30.[63] The Israeli Air Force intercepted a Houthi drone before it crossed into Israeli territory on July 30.[64]

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 October 2023.[65]

Palestinian Territories and Lebanon

Lebanese President Joseph Aoun publicly called on Hezbollah to disarm during a speech on July 31.[66] Aoun called on Hezbollah to “rely solely on the Lebanese state” and said that Hezbollah’s refusal to disarm enables Israel to justify attacks on Lebanon.[67] Aoun has previously emphasized the need for the Lebanese state to have a monopoly on arms but has never explicitly urged Hezbollah to disarm.[68] Hezbollah has persistently rejected calls to disarm, which makes it unlikely that Hezbollah will accept Aoun’s call for the group to give up its weapons.[69]

Aoun also revealed details about the Lebanese government’s recent counterproposal to the United States regarding Hezbollah’s disarmament during his July 31 speech. The United States and Lebanon have exchanged multiple proposals about disarming Hezbollah during negotiations over the past six weeks, but have not yet reached an agreement.[70] The United States submitted a proposal to the Lebanese government on June 19.[71] Aoun announced that the Lebanese government will discuss amendments to the US proposal during a cabinet session on August 5.[72] Aoun said that Lebanon’s counterproposal includes demands for Israel to halt operations in Lebanon and for Hezbollah to disarm.[73] The proposal also stipulates that the Lebanese Armed Forces (LAF) would recruit, equip, and deploy an additional 4,500 soldiers to southern Lebanon to seize weapons.[74] Aoun did not explain how the Lebanese government will address Hezbollah infrastructure north of the Litani River.[75] Western media reported on July 29 that Israel rejected a Lebanese government proposal in recent days.[76] It is unclear whether the amendments that Aoun outlined were made before or after Israel’s rejection.

The Lebanese government’s proposal commits the government to strengthening Lebanese border security, which could further hamper Hezbollah’s ability to smuggle weapons into Lebanon.[77] The proposal includes mechanisms to improve counter-smuggling cooperation between Lebanon and Syria.[78] Recent disruptions to Hezbollah’s land, air, and maritime smuggling routes have complicated Hezbollah’s ability to procure Iranian weapons.[79] The Syrian government and the LAF have increased counter-smuggling efforts in recent months and dismantled smuggling networks between Lebanon and Syria that Iran previously used to transfer weapons to Hezbollah.[80] The LAF has also increased its presence along the Lebanon-Syria border and maintained control over areas known for Hezbollah smuggling.[81]

**The Lebanese Government's Proposal
as of July 31, 2025, at 2:00 PM ET**

Demands
<ul style="list-style-type: none"> • Israel will immediately stop all attacks on Lebanon and withdraw from southern Lebanon
<ul style="list-style-type: none"> • The Lebanese government will establish control over all Lebanese territory
<ul style="list-style-type: none"> • The Lebanese government will disarm all armed groups, including Hezbollah
<ul style="list-style-type: none"> • Unspecified countries will provide Lebanon with \$1 billion annually for ten years to support the Lebanese Armed Forces (LAF)
<ul style="list-style-type: none"> • Lebanon will organize an international conference in fall 2025 to acquire funds for reconstruction efforts in Lebanon
<ul style="list-style-type: none"> • Lebanon will finalize land and sea border demarcations with US, Saudi, and French mediation
<ul style="list-style-type: none"> • The Lebanese government will repatriate Syrians from Lebanon to Syria
<ul style="list-style-type: none"> • The Lebanese government will increase counter-smuggling efforts with Syria
<ul style="list-style-type: none"> • The LAF will recruit and equip an additional 4,500 soldiers to deploy to southern Lebanon to help seize weaponry



Note: This information is based on open-source reports.

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