

Iran Update



Iran Update, June 26, 2025

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Information Cutoff: 2:00pm ET

Key Takeaways:

- The United States and Iran will reportedly resume nuclear negotiations in the near future. Iran will likely reject any US nuclear proposal that requires Iran to halt uranium enrichment on Iranian soil given that Iran has maintained its position on uranium enrichment from before the Israel-Iran War.
- Moderate elements within the Iranian regime may be using Supreme Leader Ali Khamenei's isolation during the Israel-Iran War to try to exert greater political influence in the regime. Four unspecified senior Iranian officials told the *New York Times* that senior Iranian officials, including President Masoud Pezeshkian, Judiciary Chief Gholam Hossein Mohseni Ejei, and Armed Forces General Staff Chief Major General Abdol Rahim Mousavi, are part of a faction that supports a pragmatic and diplomatic approach to the conflict with the United States and Israel. The *New York Times* report about pragmatic and hardline factions vying for decision-making authority follows earlier indications of internal fissures in the regime.
- International Atomic Energy Agency Director Rafael Grossi stated on June 26 that centrifuges at the Fordow Fuel Enrichment Plant (FFEP) are "no longer working" due to the US and Israeli strikes on the site. Grossi stated that centrifuges are very "delicate" and that "even small vibrations can destroy them."
- Israeli airstrikes killed several IRGC Aerospace Force commanders, including commanders who would have coordinated Iran's retaliation against Israel. The Israel Defense Forces (IDF) attacked a group of IRGC Aerospace Force commanders on June 12 who were meeting to discuss Iran's retaliation against Israel's initial airstrikes. The strike killed IRGC Aerospace Force Commander Brigadier General Amir Ali Hajji Zadeh and at least seven other commanders.

US-Iran Nuclear Negotiations and Stances

The United States and Iran will reportedly resume nuclear negotiations in the near future.[1] Neither side has changed its position on key issues, including Iranian uranium enrichment and Iran's missile program, however.[2] US President Donald Trump announced on June 25 that the United States and Iran will meet next week to discuss a potential nuclear deal.[3] Iranian Foreign Affairs Minister Abbas Araghchi dismissed Trump's announcement that Iran and the United States will meet in Oman next week, however.[4] Israeli media reported on June 26 that the

United States plans to present Iran with three baseline demands, including a total ban on uranium enrichment in Iran, the removal of all of Iran's highly enriched uranium stockpile, and limitations on future missile production.[5] Western media reported that these proposals are "preliminary and evolving," except for the US demand for zero uranium enrichment, which is non-negotiable.[6] Trump said on June 26 that "the only thing we'd be asking for is what we were asking for before." [7] US Special Envoy to the Middle East Steve Witkoff similarly told Western media on June 26 that uranium enrichment and Iranian weaponization are red lines for the United States.[8] The United States made these same demands during the US-Iran nuclear negotiations between April and June 2025.[9] Iran repeatedly rejected the US demands for zero uranium enrichment and limits to its ballistic missile program prior to the conflict, stating that its ballistic missile program and uranium enrichment on Iranian soil were non-negotiable red lines.[10] Three unspecified diplomats told Reuters on June 19 that Witkoff and Araghchi spoke several times during the Israel-Iran War to discuss the previous US nuclear proposal.[11] Two unspecified sources told Western media on June 26 that at least one preliminary US draft proposal includes several incentives for Iran.[12] The incentives reportedly include sanctions relief, the release of \$6 billion of frozen Iranian funds, monetary support from US-backed Gulf allies to replace the Fordow nuclear facility with a "non-enrichment program," and an estimated \$20 to \$30 billion investment to establish a civilian nuclear energy program.[13] Four unspecified sources stated that these incentives are "all part of an intensifying attempt to bring Tehran back to the negotiating table." [14]

Iran will likely reject any US nuclear proposal that requires Iran to halt uranium enrichment on Iranian soil given that Iran has maintained its position on uranium enrichment from before the Israel-Iran War. Senior Iranian officials have emphasized since the start of the Israel-Iran ceasefire that Iran will not change its position on uranium enrichment.[15] Iranian First Vice President Mohammad Reza Aref, for example, stated on June 25 that Iran will not negotiate its right to enrich uranium on Iranian territory.[16] Iran's continued rejection of the US demand for zero uranium enrichment after the conflict suggests that Iran is unlikely to make concessions during the reported upcoming talks. The United States and Israel have suggested that they would resume strikes on Iran if Iran decides to rebuild its nuclear program.[17]

Iran has made the recognition of its right to enrich uranium a precondition for the International Atomic Energy Agency (IAEA) to be able to inspect Iranian nuclear facilities. Iran's Guardian Council approved a bill on June 26 that suspends Iran's cooperation with the IAEA and bars inspectors from accessing Iran's nuclear facilities.[18] The bill requires Iran to suspend cooperation with the IAEA until the IAEA recognizes Iran's right to enrich uranium.[19] The bill also states that the international community must show "full respect...[for the] security of nuclear sites and scientists," likely to try to protect Iran's nuclear facilities from further US or Israeli strikes.[20] Iran has historically restricted IAEA oversight in Iran, including by withdrawing the certifications of several inspectors in September 2023 and barring other top inspectors in November 2024.[21]

Supreme Leader Ali Khamenei reiterated on June 26 that Iran will not "surrender" to the United States during his third televised message to the Iranian public since June 12.[22] Khamenei claimed that the United States seeks nothing less than Iran's "surrender" and emphasized that Iran will not give in to this demand.[23] Khamenei claimed that Iran's confrontation

with the United States is no longer confined to uranium enrichment and the Iranian nuclear program.[24] Khamenei also claimed that Iran achieved a “victory” over Israel and the United States.[25] Khamenei said that the Iranian attack on al Udeid Airbase in Qatar was a “hard slap” that “can be repeated.”[26]

Internal Iranian Dynamics

Moderate elements within the Iranian regime may be using Supreme Leader Ali Khamenei’s isolation during the Israel-Iran War to try to exert greater political influence in the regime. Unspecified Iranian officials told the *New York Times* on June 26 that Khamenei is sheltering in a bunker under strict security and with limited communication.[27] Khamenei has not made any public appearances since the start of the Israeli air campaign in Iran on July 12 except for three pre-recorded televised speeches.[28] Khamenei’s isolation has reportedly spurred efforts by more moderate elements of the regime to play a more significant role in regime decision-making.[29] Four unspecified senior Iranian officials said that senior Iranian officials, including President Masoud Pezeshkian, Judiciary Chief Gholam Hossein Mohseni Ejei, and Armed Forces General Staff Chief Major General Abdol Rahim Mousavi, are part of a faction that supports a pragmatic and diplomatic approach to the conflict with the United States and Israel.[30] Ultraconservative politician and Paydari (Stability) Front leader Saeed Jalili and other conservative officials have openly challenged this pragmatic faction and opposed the ceasefire with Israel.[31] Jalili has criticized Pezeshkian and Foreign Affairs Minister Abbas Araghchi for agreeing to the ceasefire with Israel and signaling openness to renewed nuclear negotiations with the United States.[32] Members of Jalili’s faction include hardliners in the Iranian Parliament and unspecified senior Islamic Revolutionary Guards Corps (IRGC) commanders.

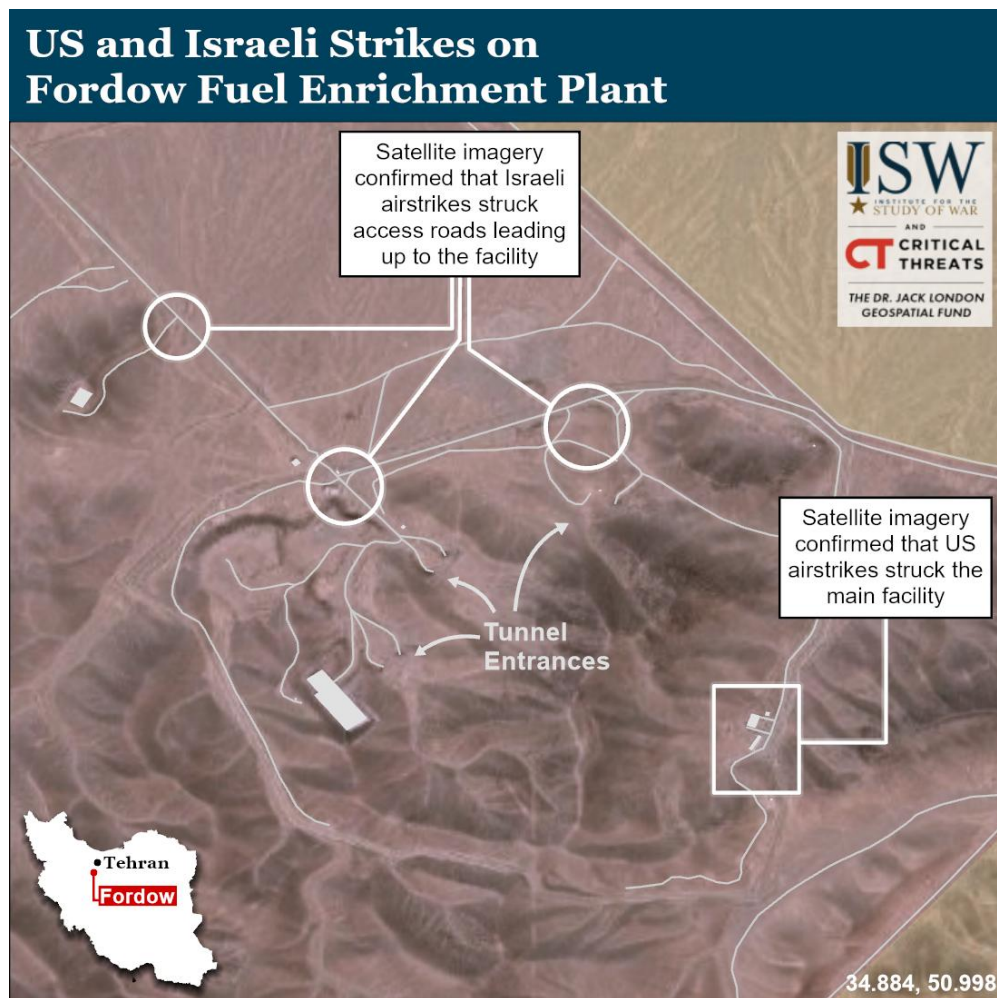
The *New York Times* report about pragmatic and hardline factions vying for decision-making authority follows earlier indications of internal fissures in the regime. Opposition media reported on June 21 that former President Hassan Rouhani met with senior clerics in Qom to encourage them to persuade Khamenei to drop Iran’s demand for uranium enrichment on Iranian soil and accept a ceasefire with Israel. Rouhani reportedly framed these efforts as a way to “save” the Islamic Republic.[33] Supreme Leader adviser Ali Larijani and Expediency Discernment Council head Sadegh Amoli Larijani reportedly attempted to contact Khamenei to advocate for a ceasefire but were unsuccessful.[34] The emergence of moderate elements during Khamenei’s isolation suggests that these elements may be using Khamenei’s absence to try to play a larger and more meaningful role in regime decision-making, particularly as these elements are typically sidelined by hardliners during normal times.

Battle Damage Assessments

International Atomic Energy Agency Director Rafael Grossi stated on June 26 that centrifuges at the Fordow Fuel Enrichment Plant (FFEP) are “no longer working” due to the US and Israeli strikes on the site.[35] Grossi stated that centrifuges are very “delicate” and that “even small vibrations can destroy them.”[36] The United States dropped 12 30,000-lb GBU-57 massive ordnance penetrator (MOP) bunker-buster bombs on Fordow.[37] A GBU-57 MOP can carry 5,000 pounds of explosives.[38] The six entry points of the US bunker-buster bombs at Fordow were above two weak points, and the bombs would have detonated within the facility. The Institute for Science and International Security previously assessed that the bomb blast would have been channeled

by the centrifuge cascade hall's side walls, which would have destroyed all of the installed centrifuges in the hall.[39] The IAEA reported in May 2025 that FFEP houses six operating IR-1 and seven operating advanced IR-6 cascades.[40] Each cascade is comprised of approximately 160 to 170 centrifuges. Fordow was responsible for producing nearly 90 percent of Iran's 60 percent enriched uranium stockpile in the last IAEA reporting period from February to May 2025.[41]

Satellite imagery from June 24 showed damage to access roads leading to Fordow due to Israeli strikes.[42] Israel conducted airstrikes on June 23 targeting roads leading to FFEP in order to "disrupt" access to the site.[43] CTP-ISW previously assessed that Israeli strikes on access roads to Fordow may prevent Iran from being able to assess and repair damage at Fordow or move materials from the site to other locations.[44]



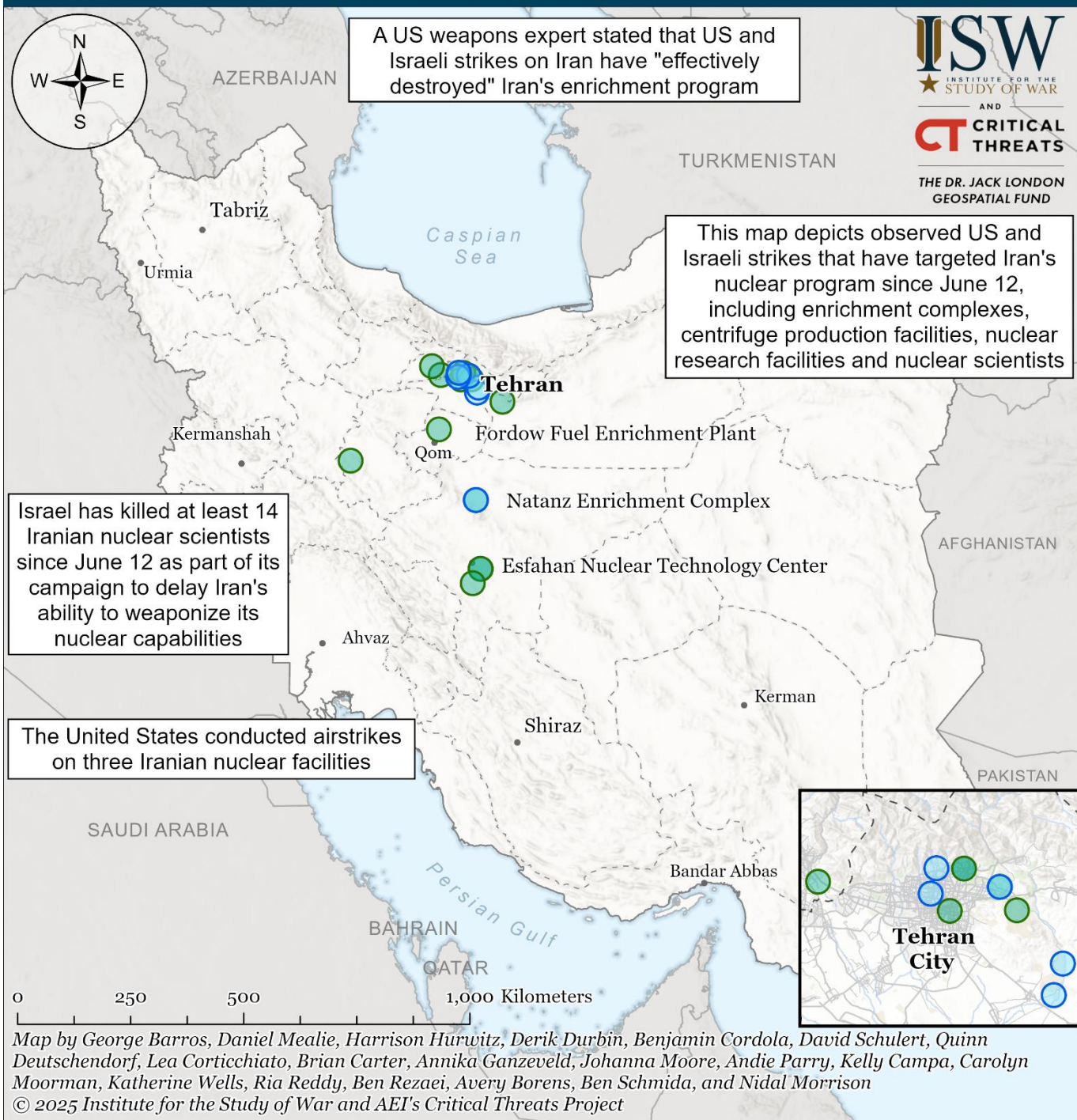
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Image Courtesy of Planet Labs PBC

Recent media reports have highlighted that the US and Israeli strikes on Iranian nuclear facilities failed to destroy Iran's highly enriched uranium stockpile, which includes 20 and 60 percent enriched uranium. It is not possible to destroy enriched uranium, however, given that uranium is an element. Two unspecified officials told the *Financial Times* on June 26 that Iran's highly enriched uranium stockpile "remains largely intact" following the

US and Israeli strikes on Iran's nuclear facilities, citing "preliminary intelligence assessments provided to European governments."^[45] The US and Israeli strikes on Fordow and other enrichment facilities could have buried enriched uranium underground to limit access to it but could not have destroyed the material. Unspecified Israeli sources told Axios that some of Iran's stockpile of highly enriched uranium is buried under rubble at the Fordow and Esfahan nuclear sites.^[46]

Iran's remaining enriched uranium stockpile could potentially pose a weapons risk if Iran chooses to rebuild its nuclear program. Iran may have moved some enriched uranium from its nuclear facilities to other locations ahead of US and Israeli strikes.^[47] Iran would still need to further enrich its 60 percent enriched uranium to weapons-grade uranium (WGU), which is uranium enriched to 90 percent. The degradation of Iran's nuclear program, including the loss of thousands of centrifuges, may complicate Iran's ability to further enrich its 60 percent enriched uranium stockpile to 90 percent. Uranium enrichment becomes progressively quicker at higher levels, however. Reaching 20 percent enriched uranium from natural uranium (approximately 2 percent) requires significantly more effort than enriching from 60 percent to WGU. Iran would still need to turn the WGU into a usable weapon, moreover. A US weapons expert stated that the US and Israeli strikes have made it significantly more difficult and time-consuming for Iran to weaponize its WGU to develop a bomb.^[48] Israel targeted various aspects of Iran's weaponization program, including at least 14 Iranian nuclear scientists.^[49]

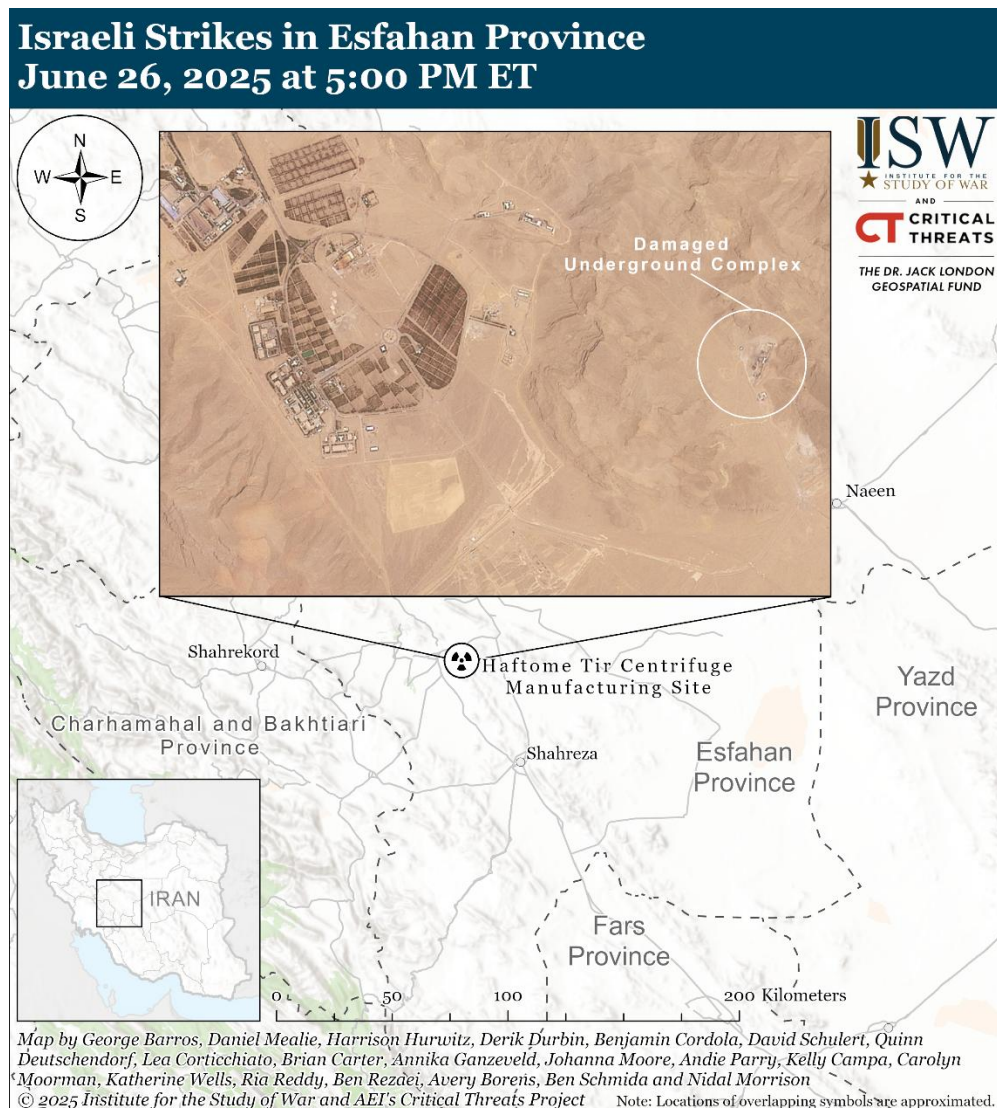
US and Israeli Strikes Targeting the Iranian Nuclear Program June 12 to June 24, 2025



Confirmed Airstrike

Reported Airstrike

Likely Israeli strikes damaged an underground complex south of Esfahan that was reportedly involved in centrifuge production.[50] Commercially available satellite imagery from June 25 showed damage to a large underground complex near Haftom-e Tir Industries in Baghmalek, about 30 kilometers south of Esfahan City.[51] The complex's entrance is located on a mountain approximately two kilometers east of Haftom-e Tir Industries. The United States sanctioned Haftom-e Tir in 2008 for its involvement in Iran's centrifuge development program.[52] Haftom-e Tir is a subsidiary of the Defense Industries Organization (DIO), which the United States sanctioned in 2007 for contributing to the proliferation of weapons of mass destruction.”[53] The DIO is a subsidiary of the Iranian Defense and Armed Forces Logistics Ministry. The Institute for Science and International Security reported in 2022 that Haftom-e Tir Industries may have had equipment to manufacture “high strength components” for advanced centrifuges.[54] A US weapons expert said that centrifuge components were previously manufactured in a small underground facility under the Haftom-e Tir facility, which may refer to the damaged underground complex identified in satellite imagery.[55]



Israel also damaged several Iranian nuclear research facilities. A nuclear and missile analyst said on June 25 that satellite imagery shows damage from Israeli strikes to an underground facility connected to the Yazd Radiation Processing Center.[56] The Yazd Radiation Processing Center conducts applied radiation chemistry research.[57] Iran's Atomic Energy Organization oversees the center.[58] Satellite imagery from June 20 also showed significant damage to at least four buildings at Shahid Rajaei University in Lavisan, Tehran.[59] Shahid Rajaei University is affiliated with Iran's nuclear program and some US officials believe that the university has been involved in nuclear warhead design research.[60] Israel struck the facility between June 14 and 20.[61]

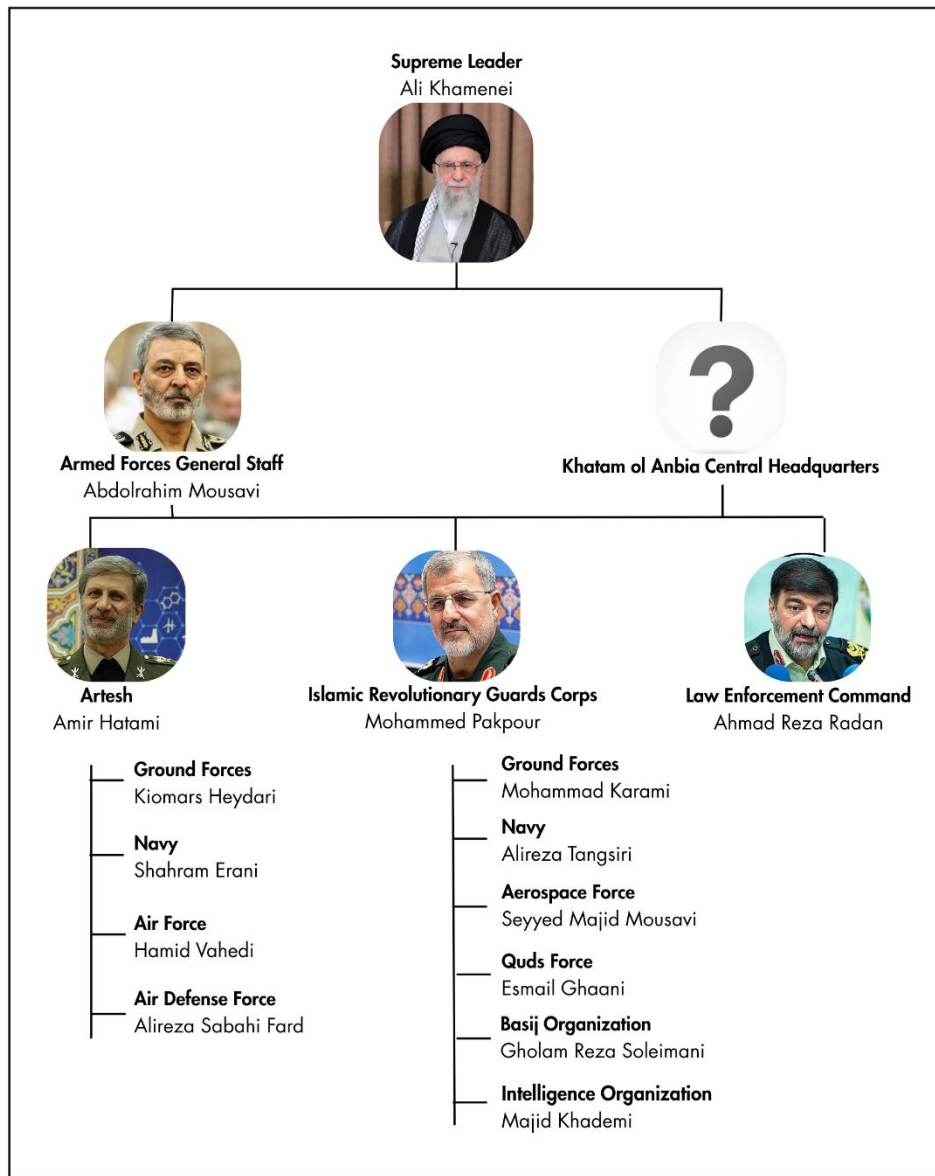
Israeli Decapitation Campaign

Israeli airstrikes killed several IRGC Aerospace Force commanders, including commanders who would have coordinated Iran's retaliation against Israel.[62] Israel conducted a decapitation campaign targeting senior Iranian military leadership during its 12-day air campaign. The Israel Defense Forces (IDF) attacked a group of IRGC Aerospace Force commanders on June 12 who were meeting to discuss Iran's retaliation against Israel's initial airstrikes.[63] The strike killed IRGC Aerospace Force Commander Brigadier General Amir Ali Hajji Zadeh and at least seven other commanders.[64] The IRGC Aerospace Force is responsible for Iran's missile and drone arsenals and has invested significant resources over many years to assemble the largest missile inventory in the Middle East.[65] The IDF intended to delay any immediate Iranian retaliatory attack by killing top IRGC Aerospace Force commanders.[66] An Israeli official told Axios on June 13 that "the fact that there was nobody to give the order neutralized an immediate Iranian response." [67] Iran did not respond until about six hours after the initial Israeli strikes.[68] The IRGC confirmed the deaths of the following IRGC Aerospace Force commanders:[69]

- **Brigadier General Davoud Sheikhian:** Sheikhian commanded the IRGC Aerospace Force's air defense program. Sheikhian previously served as the IRGC Aerospace Force operations deputy.[70] Iranian media interviewed Sheikhian in November 2024 at an underground Iranian missile site.[71] Sheikhian was killed in the June 12 Israeli attack on IRGC Aerospace Force commanders.[72]
- **Brigadier General Mansour Safarpour:** Safarpour was a commander in the IRGC Aerospace Force. Several Iranian outlets claimed that Safarpour oversaw the IRGC Aerospace Force in the greater Tehran region while other outlets identified Safarpour as a deputy intelligence officer.[73] Safarpour was killed in the June 12 attack.[74]
- **Brigadier General Masoud Tayyeb:** Tayyeb was an IRGC Aerospace Force spokesperson. Tayyeb was killed in the June 12 attack.[75]
- **Brigadier General Javad Jarsara:** Jarsara was an IRGC Aerospace Force spokesperson. Jarsara was killed in the June 12 attack.[76]
- **Brigadier General Ali Mohammad Madadollahi:** Madadollahi was an adviser to Hajji Zadeh.

The IRGC also confirmed that Israeli strikes killed the following senior commanders between June 13 and 24:[77]

- **Brigadier General Reza Mozaffarinia:** Mozaffarinia commanded the Special Weapons Center at the Organization of Defensive Innovation and Research (SPND).[78] The SPND played a leading role in the Iranian nuclear weapons research program before 2003.[79] The IDF struck the SPND headquarters in Tehran three times during its 12-day campaign, although it is unclear where Mozaffarinia was killed.[80] The United States sanctioned Mozaffarinia in 2013.[81] Mozaffarinia was killed on June 12.[82]
- **Brigadier General Mohammed Jafar Asadi:** Asadi served as the Khatam ol Anbia Central Headquarters Inspection Deputy. The Khatam ol Anbia Central Headquarters is the highest Iranian operational headquarters and is responsible for joint and wartime operations, performing a role similar to a US combatant command.[83] Asadi previously commanded the IRGC Ground Forces between 2008 and 2009.[84] He later commanded Iranian forces in the Syrian Civil War from 2013 to 2015.[85]
- **Brigadier General Mohammad Reza Nasir Baghban:** Baghban was former IRGC Commander Major General Hossein Salami's representative to the IRGC Intelligence Organization.[86] Baghban previously served as the Iranian Consul General in Basra Province, Iraq, in the 2000s.[87]
- **Brigadier General Masoud Shanei:** Shanei headed the IRGC General Command Office. Shanei was killed alongside Salami on June 12.[88] Shanei reportedly had a close relationship with Salami.[89]
- **Brigadier General Seyyed Mojtaba Moinpour:** Moinpour was the deputy commander of the IRGC headquarters in Alborz Province. Moinpour was killed in an Israeli strike on the Imam Hassan Mojtaba Provincial Unit in Karaj, Alborz Province, on June 23.[90]
- **Brigadier General Abbas Nouri:** Nouri was the Artesh Ground Forces Southwest Regional Headquarters Support Deputy.[91] This headquarters is located in Ahvaz, Khuzestan Province.[92]



Iran-Belarus Cooperation

Iran has continued to develop defense ties with Belarus following the Israel-Iran War. Iranian Defense Minister Brigadier General Aziz Nasir Zadeh met with a Belarusian military delegation in China on June 26, possibly to secure Belarusian military support and sell Iranian weapons systems to Belarus.[93] The Iranian and Belarusian delegations met on the sidelines of a Shanghai Cooperation Organization (SCO) meeting in Qingdao, China.[94] The Iranian Defense Ministry is responsible for foreign arms sales and defense agreements.[95] The Iranian-Belarusian meeting comes amid increased defense cooperation between the two countries in recent months.[96] The Iranian Defense Ministry showcased Iranian defense equipment at a military exhibition in Minsk, Belarus, on May 22.[97] Nasir Zadeh visited Belarus in March 2025 and signed a defense agreement with

Belarusian Defense Minister Lieutenant General Victor Khrenin.[98] Iran has reportedly worked to establish a drone factory in Belarus since May 2023 to support the Russian invasion of Ukraine.[99]

Iran and the Axis of Resistance

The Israel-Iran War could be limiting Iran's ability to financially support Hezbollah. Hezbollah reportedly announced on June 25 that it has immediately and indefinitely suspended compensation payments to its fighters.[100] The payments are distributed by al Qard al Hassan, which is one of Hezbollah's main banking and financial arms.[101] Israel targeted several al Qard al Hassan branches during the Israel-Hezbollah conflict.[102] The *Wall Street Journal* reported in January 2025 that 28 al Qard al Hassan branches had resumed operations, however.[103] Hezbollah claimed that the recent suspension of payments is due to operational difficulties and a shortage of cash liquidation.[104] Iran has been reduced to sending Hezbollah cash rather than large weapons shipments due to the loss of key transportation routes after the collapse of the Assad regime in Syria.[105] The IDF killed two IRGC and Hezbollah figures responsible for transferring Iranian funds to Hezbollah, including IRGC Unit 190 Commander Behnam Shariari and al Sadiq Exchange Office head Haytham Abdullah Bakri, during the Israel-Iran War.[106] Hezbollah's suspension of payments could be an indication that the Iranian regime is prioritizing using its money to repair destruction and replace equipment that it lost during the recent conflict over financially supporting its proxies.

Hezbollah has struggled to maintain its financial commitments to its fighters following the Israel-Lebanon conflict.[107] Al Qard al Hassan previously froze compensation payments in February 2025.[108] Hezbollah has historically used financial incentives, including pensions and payments for the families of deceased fighters, to retain its support base.[109] Lebanese civilians' loyalty and support for Hezbollah could wane if Hezbollah does not resume distributing these financial benefits.

Potential Abraham Accords Expansion

An unspecified source told Israeli media on June 26 that Israeli Prime Minister Benjamin Netanyahu and US President Donald Trump agreed to expand the Abraham Accords to include Syria and Saudi Arabia.[110] Trump and Netanyahu reportedly agreed to "swiftly expand" the Abraham Accords to include Syria, Saudi Arabia, and other unspecified Arab countries.[111] This report comes amid several statements from US and Israeli officials regarding the Abraham Accords. Netanyahu stated on June 26 that the outcome of the Israel-Iran War "presents an opportunity for a dramatic widening of peace agreements." [112] US Special Envoy to the Middle East Steve Witkoff told Western media on June 25 that "we think we will have some pretty big announcements on countries that are coming into the Abraham Accords." [113] Trump and Netanyahu also reportedly agreed to end Israeli operations in the Gaza Strip within two weeks and have four Arab countries take over the administration of the Gaza strip.[114]



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