

# Iran Update Special Report, April 26, 2026



**Kelly Campa, Benjamin Schmida, Adham Fattah, Nidal Morrison, Carolyn Moorman, Brian Carter**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

## Key Takeaways

1. Prospects for meaningful US-Iran negotiations remain low due to the Islamic Revolutionary Guards Corps' (IRGC) domination of decision-making and opposition to compromise. Iranian Foreign Affairs Minister Abbas Araghchi travelled to Muscat, Oman, on April 26 to discuss security in the Strait of Hormuz with Omani Sultan Haitham al Tariq.
2. Israel deployed an Iron Dome battery and Israeli Defense Forces (IDF) personnel to the United Arab Emirates (UAE), which demonstrates the deepening of Israeli and Emirati security ties as a result of the war. Two Israeli officials and one US official told Western media on April 26 that Israeli Prime Minister Benjamin Netanyahu ordered the IDF to send an Iron Dome battery and "several dozen" IDF personnel to operate it after a phone call with Emirati President Mohammed bin Zayed.

## Toplines

**Prospects for meaningful US-Iran negotiations remain low due to the Islamic Revolutionary Guards Corps' (IRGC) domination of decision-making and opposition to compromise.** Iranian Foreign Affairs Minister Abbas Araghchi travelled to Muscat, Oman, on April 26 to discuss security in the Strait of Hormuz with Omani Sultan Haitham al Tariq.[1] Araghchi then travelled to Islamabad, Pakistan, to discuss Iran's preconditions for talks with the United States with Pakistani mediators, including the end of the US blockade on Iranian ports.[2] IRGC-affiliated media reported on April 26 that Araghchi discussed the implementation of "a new legal regime over the Strait of Hormuz," war compensation, and a guarantee of no future US attacks.[3] There was no reported discussion of Iran's nuclear program, which is a key issue for the United States. US President Donald Trump said that Iran sent the United States a "much better" offer 10 minutes after he canceled US Special Envoy to the Middle East Steve Witkoff and Jared Kushner's planned trip to Islamabad, Pakistan, for talks with Iran on April 25.[4] Trump said the new offer involves Iran not having a nuclear weapon but added that it is "not enough." [5]

**Israel deployed an Iron Dome battery and Israeli Defense Forces (IDF) personnel to the United Arab Emirates (UAE), which demonstrates the deepening of Israeli and Emirati security ties as a result of the war.** Two Israeli officials and one US official told Western media on April 26 that Israeli Prime Minister Benjamin Netanyahu ordered the IDF to send an Iron Dome battery and “several dozen” IDF personnel to operate it after a phone call with Emirati President Mohammed bin Zayed.[6] Unspecified Israeli and Emirati officials also told Western media that both countries have been “coordinating closely military and politically” since the start of the war.[7] Israel and the UAE have been expanding their defense cooperation since the UAE normalized its relations with Israel by signing the Abraham Accords in 2020.[8]

## Maritime Developments

**The United States has continued to enforce its blockade on Iranian ports.** US forces intercepted the US-sanctioned, Panamanian-flagged *Sevan* (IMO: 9177806) gas tanker on April 25 in the Arabian Sea.[9] The US Treasury Department sanctioned the *Sevan* on April 24 for transporting Iranian oil and gas products to foreign markets.[10] The *Sevan* entered the Strait of Hormuz on April 21 via the Iranian-approved route and crossed the US blockade line on April 24, according to commercially available shipping data. Maritime intelligence company Tanker Trackers said on April 25 that the *Sevan* recently loaded gas in Iran, and travels frequently to Bangladesh and Yemen.[11] US Central Command (CENTCOM) stated on April 25 that it has redirected 37 Iranian or Iranian-linked vessels since the start of the blockade.[12]



## US-Israeli Air Campaign

*Nothing significant to report.*

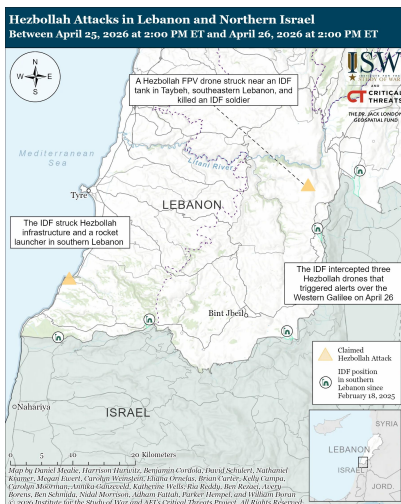
## Iranian Response

**Six people familiar with the matter told NBC News that an Iranian F-5 fighter jet caused some damage to Camp Beuhling, which is a major US base in Kuwait, within the “first few days” of the war.**[13] Iran conducted multiple attacks targeting the base at the start of the war.[14]

# Israeli Campaign Against Hezbollah and Hezbollah Response

**The IDF struck Lebanese Hezbollah infrastructure, fighters, and launchers across southern Lebanon on April 25 and 26.[15]** Israeli Prime Minister Benjamin Netanyahu said that the IDF was operating with “significant force” after Hezbollah attacks on Israeli forces in Lebanon.[16] The IDF issued evacuation orders for seven Lebanese villages immediately north of the Litani River on April 26.[17] The IDF warned residents that Hezbollah violated the ceasefire.[18] The IDF said that it struck Hezbollah infrastructure and a rocket launcher.[19] Lebanese media reported Israeli strikes on targets in at least 16 villages and towns in southern Lebanon on April 26.[20]

**Hezbollah launched drones targeting Israeli forces in southern Lebanon, framing its attacks as a “legitimate response” to alleged Israeli ceasefire violations.** Netanyahu accused Hezbollah of “effectively eroding the ceasefire” through its continued attacks.[21] Hezbollah framed its attacks targeting Israeli towns and Israeli troops in southern Lebanon as a “legitimate response” to continued Israeli airstrikes and operations in Lebanon.[22] Hezbollah continued to fire drones targeting Israeli troops in southern Lebanon, including first-person view (FPV) drones. A Hezbollah FPV drone struck near an IDF tank in Taybeh, southeastern Lebanon, and killed a soldier from the 1st (Golani) Infantry Brigade (36th Armored Division).[23] Hezbollah also fired two other FPV drones targeting Israeli forces evacuating casualties.[24] The IDF also intercepted two unspecified Hezbollah drones in southern Lebanon.[25]



**Hezbollah published footage of a fiber-optic FPV drone attack targeting an Israeli tank in Mays al Jabal on April 11.[26]** Hezbollah has “increasingly” used both FPV and fiber optic FPV drones to target Israeli troops in southern Lebanon since the IDF first entered Lebanon in March 2026.[27] Fiber-optic FPV drones are immune to jamming.[28]

**Hezbollah also continued to fire munitions targeting northern Israel.** The IDF intercepted three Hezbollah drones that triggered alerts over the Western Galilee on April 26.[29] Hezbollah has not claimed the attack as of this writing. CTP-ISW assessed on April 26 that Hezbollah may be conducting smaller-scale attacks targeting uninhabited areas of northern Israel and Israeli forces in southern Lebanon to demonstrate that it can threaten Israeli security and will respond to Israeli operations in Lebanon without provoking a large Israeli response.[30]

**Hezbollah harshly criticized the Lebanese government for not securing an Israeli commitment to end operations in southern Lebanon during recent Israel-Lebanon talks in Washington, DC.[31]** Hezbollah called the Lebanese government “impotent” and accused it of “emboldening” Israel’s ability to “violate” the ceasefire.[32] Hezbollah’s criticism of the Lebanese government, which it used to

justify its “right” to attack Israel, is part of the group’s long-standing narrative about the necessity of its own role in defending Lebanon.

## Other Axis of Resistance Response

*Nothing significant to report.*

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### Endnotes

- [1] <https://www.reuters.com/world/asia-pacific/us-iran-peace-hopes-fade-trump-scraps-talks-2026-04-26/>
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- [8] <https://www.washingtoninstitute.org/policy-analysis/israel-uae-defense-cooperation-grows-under-abraham-accords>
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[19] <https://x.com/idfonline/status/2048358171245150256>

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[21] <https://www.nytimes.com/2026/04/26/world/middleeast/iranian-negotiators-set-to-return-to-pakistan-to-tr-y-to-revive-truce-talks.html>

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# Iran Update Special Report, April 27, 2026



**Carolyn Moorman, Benjamin Schmida, Adham Fattah, William Doran, Nidal Morrison, Kelly Campa, Annika Ganzeveld**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. Iran appears to be attempting to exploit its leverage over the Strait of Hormuz to end the war in a way that removes the US blockade of Iranian ports without Iran having to make nuclear concessions. Iran presented a new proposal to the United States in which it reportedly offered to “reopen” the Strait of Hormuz and end the war, while postponing US-Iran nuclear negotiations to a later date. The Iranian proposal would not force Iran to make concessions regarding its highly enriched uranium or ability to enrich uranium up front, but would rather grant Iran more time to engage in talks about these nuclear issues. It is unclear if Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi and his inner circle support this new proposal.
2. Iran’s rapidly depleting oil storage capacity likely explains, at least in part, why Iran is pushing for a peace agreement that would lift the US naval blockade. The *Wall Street Journal* reported on April 27 that the US blockade on Iranian ports has forced Iran to store oil in “disused oil tanks in poor condition” and in “containers” in the cities of Ahvaz, Khuzestan Province, and Asaluyeh, Bushehr Province, according to unspecified current and former Iranian officials.
3. An Iranian delegation led by Iranian Foreign Affairs Minister Abbas Araghchi emphasized the importance of Russo-Iranian strategic relations in a meeting with Russian President Vladimir Putin in St. Petersburg on April 27. Russia has facilitated Iranian strikes in the Middle East throughout the war, such as by providing Iran with satellite imagery of US, Gulf, and Turkish military assets in the Middle East.
4. Hezbollah has increasingly used first-person view (FPV) drones to attack Israeli forces in Lebanon since the ceasefire came into effect on April 16. Hezbollah has claimed that it used FPV drones in 12 of its 18 claimed attacks on Israeli ground forces in Lebanon since April 16. Israeli media

reported that Hezbollah has begun using fiber-optic FPV drones as its main strike platform for attacks on Israeli forces in southern Lebanon.

## Toplines

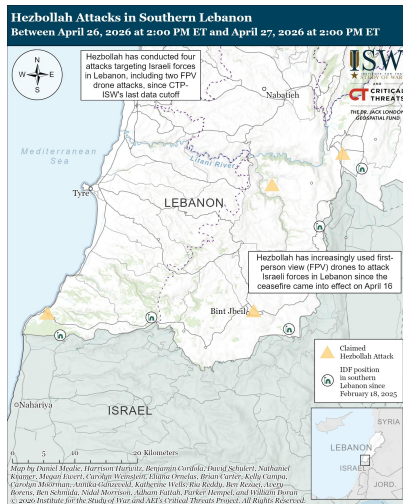
**Iran appears to be attempting to exploit its leverage over the Strait of Hormuz to end the war in a way that removes the US blockade of Iranian ports without Iran having to make nuclear concessions.** Iran presented a new proposal to the United States in which it reportedly offered to “reopen” the Strait of Hormuz and end the war, while postponing US-Iran nuclear negotiations to a later date.[1] US President Donald Trump described the proposal on April 25 as “much better” than previous Iranian proposals but stated that the proposal is “not enough.”[2] US Press Secretary Karoline Leavitt said on April 27 that Trump discussed the Iranian proposal with his top national security aides and reiterated that Trump seeks to ensure freedom of navigation through the strait and to remove Iran’s highly enriched uranium (HEU).[3] The Iranian proposal would not force Iran to make concessions regarding its HEU or ability to enrich uranium up front, but would rather grant Iran more time to engage in talks about these nuclear issues. It is unclear if Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi and his inner circle, which ISW-CTP continues to assess dominates Iranian decision-making, support this new proposal. One source with knowledge on the topic told Axios on April 27 that Iranian Foreign Affairs Minister Abbas Araghchi told Pakistani, Egyptian, Turkish, and Qatari mediators in recent days that there is no consensus among Iran’s leaders on how to address US demands.[4]

**Iran’s rapidly depleting oil storage capacity likely explains, at least in part, why Iran is pushing for a peace agreement that would lift the US naval blockade.**[5] *The Wall Street Journal* reported on April 27 that the US blockade on Iranian ports has forced Iran to store oil in “disused oil tanks in poor condition” and in “containers” in the cities of Ahvaz, Khuzestan Province, and Asaluyeh, Bushehr Province, according to unspecified current and former Iranian officials.[6] Hamid Hosseini, the spokesperson for Iran’s oil exporting union, told *The Wall Street Journal* that Iran is trying to send its oil to China by rail.[7] *The Wall Street Journal* noted that most exporters avoid transporting oil by rail because rail shipments are less efficient and less profitable than seaborne shipments, however.[8] *The Wall Street Journal’s* April 27 report is consistent with a prior April 12 estimate from a US sanctions analyst that Iran had roughly 13 days of onshore storage capacity remaining before it would be forced to shut down oil production.[9] ISW-CTP is unable to independently assess the exact status of Iran’s onshore and offshore storage capacity. Any shutdown of Iranian oil wells could cause permanent reservoir damage, however, which would affect Iran’s ability to produce its most valuable export.[10]

**An Iranian delegation led by Iranian Foreign Affairs Minister Abbas Araghchi emphasized the importance of Russo-Iranian strategic relations in a meeting with Russian President Vladimir Putin in St. Petersburg on April 27.**[11] This meeting notably occurs as Iran prepares for a potential resumption of conflict with the United States and Israel. Russia has facilitated Iranian strikes in the Middle East throughout the war, such as by providing Iran with satellite imagery of US, Gulf, and Turkish military assets in the Middle East.[12]

**Hezbollah has increasingly used first-person view (FPV) drones to attack Israeli forces in Lebanon since the ceasefire came into effect on April 16.**[13] Hezbollah has claimed that it used FPV drones in 12 of its 18 claimed attacks on Israeli ground forces in Lebanon since April 16.[14] Hezbollah has also posted footage of recent FPV drone attacks targeting Israeli personnel and vehicles.[15] Some of the footage shows Hezbollah operating fiber-optic FPV drones. Israeli media reported that Hezbollah has begun using fiber-optic FPV drones as its main strike platform for attacks on

Israeli forces in southern Lebanon.[16] Israeli media claimed that Hezbollah’s fiber-optic FPV drones have an operational range of up to 15 kilometers and can carry explosive payloads of up to six kilograms.[17] Fiber-optic FPV drones pose a greater threat to Israeli ground forces than rockets or other Hezbollah weapons because they are immune to jamming, difficult to intercept using conventional air defense systems, and can target individuals and vehicles with high precision.[18] A Hezbollah FPV drone attack killed one IDF soldier and wounded six others in Taybeh, Marjaayoun District, on April 26.[19] Hezbollah launched a subsequent FPV drone attack targeting the same Israeli unit while it was conducting a casualty evacuation from Taybeh. Israeli soldiers shot down the FPV drone several meters away from the evacuation site.[20]



## Maritime Development

See topline section.

## US and Israeli Air Campaign

**Iranian media claimed that Islamic Revolutionary Guards Corps (IRGC) forces have recovered unexploded US missiles and are trying to “reverse engineer” them.** Iranian state media claimed on April 27 that the IRGC Ground Forces Imam Sajjad Unit in Bandar Abbas, Hormozgan Province, “neutralized more than 15 heavy American missiles” and transferred them to IRGC research centers for reverse engineering.[21] The report also claimed that the Imam Sajjad Unit has neutralized or destroyed more than 60 missiles and drones, as well as bunker buster munitions, since the war began on February 28.[22] The report added that the IRGC Ground Forces Ansar ol Mehdi Unit separately recovered more than 9,500 US submunitions dispersed from cluster munitions and around 55 rockets and drones across Zanzan Province.[23] CTP-ISW cannot independently verify these reports, including the types or number of weapons Iranian forces may have recovered. It would not be surprising if Iranian forces sought to reverse engineer systems that they could recover, however.

**Combined force strikes during the war have degraded Iran’s steel production capacity and ability to export steel.** Iranian state media reported on April 27 that Iran has banned the export of steel slabs and sheets until May 30, according to Reuters.[24] Combined force strikes, including strikes on major Iranian steel producers such as the Mobarakeh Steel Company and Khuzestan Steel Company, reportedly destroyed about 25 to 30 percent of Iran’s total steel output.[25] Iran may have banned the export of steel products to reserve its remaining steel stockpile for domestic use, including for missile production. Iran also may have banned the export of steel products due to fears of US forces interdicting

Iranian ships attempting to export steel, which is one of the Iranian items the United States has designated as contraband and subject to the US naval blockade.[26]

## Iranian Response

*Nothing significant to report.*

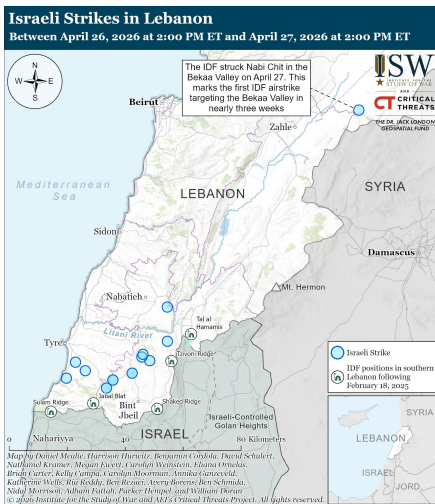
## Israeli Campaign Against Hezbollah and Hezbollah Response

**Hezbollah “categorically” rejected the results of any direct negotiations between Israel and Lebanon and criticized the Lebanese government for engaging in direct talks with Israeli officials.[27]** Israeli and Lebanese officials met in Washington, DC, on April 14 and 23.[28] Hezbollah Secretary General Naim Qassem said in a written statement on April 27 that the “outcomes” of Israel-Lebanon talks “do not exist for us, and they do not concern us in the slightest.”[29] Qassem called on the Lebanese government to end direct negotiations with Israel until five preconditions are met: a full ceasefire, Israel’s withdrawal from southern Lebanon, the release of prisoners held in Israel, the return of southern Lebanese civilians to their homes, and reconstruction.[30]

Hezbollah has always opposed direct engagement with Israel, but Qassem likely also fears that Israeli and Lebanese talks could lead to renewed Lebanese efforts to disarm Hezbollah, given that Hezbollah’s disarmament is an objective that the current Israeli and Lebanese governments share. Hezbollah previously attempted to prevent its complete disarmament through a combination of military and political measures, including through a cognitive warfare campaign to delay or ultimately reverse the government’s disarmament plan.[31] Qassem did not directly threaten the Lebanese government but said that Hezbollah hopes that the Lebanese government “will back down” from further talks.[32] Qassem also affirmed that Hezbollah would “not give up its weapons.”[33] Lebanese President Joseph Aoun responded on X that the “real traitors” are “those who dragged Lebanon into war,” likely in reference to Hezbollah.[34] Aoun emphasized that negotiating with Israel is “not treason.”[35] Reports that the Lebanese army set up a checkpoint outside of lead Lebanese negotiator Simon Karam’s house in Beirut suggest that the Lebanese government is concerned about potential threats or unrest, however.[36]

**An unspecified senior Hezbollah military commander told Al Jazeera that Hezbollah will return to conducting suicide attacks and using other tactics adopted in the 1980s to prevent the Israel Defense Forces (IDF) from “stabilizing” its buffer zone in southern Lebanon.[37]** The commander claimed that Hezbollah has deployed “large groups of suicide bombers” to the Israeli area of operations in southern Lebanon “according to pre-established plans.”[38]

**The IDF announced that it resumed airstrikes targeting Hezbollah in both southern Lebanon and the Bekaa Valley on April 27.[39]** A Hezbollah-aligned Lebanese correspondent reported that the IDF conducted one airstrike in the Bekaa Valley, targeting Nabi Chit in Baalbek-Hermel Province, on April 27.[40] This strike marks the first IDF airstrike targeting the Bekaa Valley in nearly three weeks.[41] Hezbollah threatened on April 27 to broaden its targeting of Israel if the IDF increases its scope and rate of fire in Lebanon.[42]



## Other Axis of Resistance Response

**Informed political sources told Iraqi media on April 27 that the US government sent a “strongly worded” message to several Shia Coordination Framework leaders following Iranian-backed Iraqi militia Kataib Sayyid al Shuhada leader Abu Alaa al Walai’s attendance at a recent framework meeting to discuss the framework’s prime ministerial candidate.[43]** The message reportedly stated that the United States may “reassess” the US-Iraq relationship, including its “security and economic aspects,” due to the framework’s “disregard” for US-Iraq ties.[44] The sources added that Walai’s attendance at the meeting came after the US State Department announced a financial reward of up to \$10 million USD for information about his whereabouts.[45] This report comes after the United States reportedly suspended funding for some counterterrorism and Iraqi Security Forces (ISF) training programs until Iranian-backed Iraqi militia attacks cease and the Iraqi federal government takes unspecified steps to “dismantle” the militias.[46] The United States has repeatedly pressured the Iraqi federal government to disarm Iranian-backed Iraqi militias and curb their influence within Iraqi government institutions.[47]

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### Endnotes

- [1] <https://www.axios.com/2026/04/27/iran-us-hormuz-strait-nuclear-talks-proposal-pakistan> ; <https://www.reuters.com/world/middle-east/trump-discussed-new-iran-proposal-with-national-security-aid-es-monday-white-2026-04-27/>
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# Iran Update Special Report, April 28, 2026



**Katherine Wells, Adham Fattah, Ben Rezaei, Ria Reddy, Benjamin Schmida, Parker Hempel, William Doran, Carolyn Moorman, Avery Borens, Brian Carter**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. Iran's latest proposal in negotiations offers no concessions and represents an Iranian effort to end the war on Tehran's terms. The proposal illustrates that Iran's current decisionmaker, Islamic Revolutionary Guards Corps Commander Major General Ahmad Vahidi, believes Iran is winning despite the serious damage Iran has suffered. The United States remains opposed to the most recent April 26 proposal because it failed to address both Iran's nuclear program and enabled Iran to assert "control" over the Strait of Hormuz.
2. Iran's growing challenges in storing and exporting its oil could be one mechanism by which Iranian calculations change in negotiations. Iran also faces significant pressure on other parts of its economy. It is unclear, however, whether this pressure on Iran's economy will cause Vahidi and his inner circle to make concessions to the United States.
3. Iran's highest national security decision-making body is preparing for a potential protest wave as economic deterioration and social pressure intensify. Iran's prolonged internet shutdown is also posing severe economic damage and accelerating unemployment, which likely increases pressure on regime stability.
4. Iranian Parliament Speaker Mohammad Bagher Ghalibaf appears to be trying to retain political support and remain a key actor in negotiations despite prior signs of opposition from Vahidi and his inner circle.
5. Infighting among hardline factions has escalated into a public media confrontation amid intra-regime competition over negotiations. Intra-regime power struggle between pragmatic hardliners and ultrahardliners indicates the absence of a decisive central arbiter, which has allowed factional disputes to unfold publicly.

6. Iran continues to cooperate with key US adversaries, such as Russia and China, as it prepares for a potential resumption of conflict with the United States and Israel.

## Toplines

**Iran's latest proposal in negotiations offers no concessions and represents an Iranian effort to end the war on Tehran's terms.** The proposal, according to unspecified officials familiar with the matter speaking to the Wall Street Journal and an Iranian political analyst close to the regime, centers on a three-stage plan.[1] In the first stage, the United States and Israel would commit to a permanent and guaranteed end to the war.[2] In the second stage, the United States and Iran would negotiate over the status of the Strait of Hormuz, and the United States would lift its blockade on Iranian ports.[3] Iran still aims to exert sovereignty over the Strait after the war by charging tolls on vessels passing the Strait and would seek to satisfy this demand in negotiations, according to the *New York Times* and *Wall Street Journal*. [4] In the third stage, Iran and the United States would begin negotiating over the nuclear issue.[5]

The proposal illustrates that Iran's current decisionmaker, Islamic Revolutionary Guards Corps Commander Major General Ahmad Vahidi, believes Iran is winning despite the serious damage Iran has suffered. This agreement satisfies Vahidi and his inner circle because it refuses to discuss the nuclear issue up front, and it demands nearly all of Iran's key demands, like a permanent and guaranteed end to the war and sovereignty over the Strait. Officials in Tehran, likely Vahidi and his inner circle, ordered the Iranian negotiating team not to discuss nuclear issues during the Islamabad talks.[6] Vahidi likely hopes to extract concessions from the United States, like an end to the blockade, without offering any serious concessions in response. Vahidi would have very little incentive to offer concessions on the nuclear program in the third phase of this plan if the United States committed to permanently ending hostilities with Iran and lifting the blockade. Iran and the United States remain far apart on the nuclear issue. Iran demanded a temporary suspension of enrichment for five years and stockpile dilution in its April 25 proposal.[7] The United States has asked for a 20-year enrichment suspension period.[8]

The United States remains opposed to the most recent April 26 proposal because it failed to address both Iran's nuclear program and enabled Iran to assert "control" over the Strait of Hormuz. US President Donald Trump was reportedly dissatisfied with Iran's revised April 26 proposal as it did not address Iran's nuclear program, according to administration officials speaking to Western media on April 27.[9] US Secretary of State Marco Rubio told Fox News on April 27 that the United States cannot tolerate Iran determining who uses an international waterway or charging for access.[10] Rubio's comments, one day after the White House became aware of the Iranian proposal, represent implicit opposition to Iran's proposal.

**Iran's growing challenges in storing and exporting its oil could be one mechanism by which Iranian calculations change in negotiations.** A US Sanctions analyst at Foundation for Defense of Democracies assessed on April 12 that Iran had about 13 remaining days of usable oil storage, which he calculated based on 50 to 55 million barrels of total onshore storage that was 60% full on April 12.[11] Iran likely extended the number of days before its oil storage is full by using old oil tanks in poor condition. Iran reactivated a 30-year-old very large crude carrier (VLCC) during April to hold oil, for example.[12] The VLCC had been unused for three years.[13] Market intelligence firm Kpler assessed on April 27 that Iran has between 12 and 22 remaining days before its oil storage is full.[14] Kpler's 12-day estimate assumes that not all storage tanks can be used, but the basis for that assumption is not clear. Iran has recently activated storage facilities that are suboptimal, but those storage facilities presumably have other costs for Iranian capacity and oil exports associated with them. US President Donald Trump

posted on April 28 on Truth Social that Iran told the United States that it is in a “state of collapse” and that Iran wants an end to the US blockade as soon as possible.[15]

**Iran faces significant pressure on other parts of its economy.** Combined force strikes during the war, as well as Iran’s difficulties with storing and exporting oil, have had negative ripple effects on other sectors of Iran’s economy. Reuters reported on April 27 that combined force strikes, including strikes on major Iranian steel producers such as the Mobarakeh Steel Company and Khuzestan Steel Company, reportedly destroyed about 25 to 30 percent of Iran’s total steel output.[16] A chemical engineer working at one of Iran’s biggest private construction contractors told the Associated Press on April 28 that it had to shut down a project with Mobarakeh, which cost 1,000 jobs.[17] The son of an Iranian rugmaker told AP that around 80% of rug and carpet manufacturers have stopped operations in the industrial zone of Kashan, Esfahan Province, due to the plummet of Iranian exports during the war.[18] A US sanctions analyst assessed on April 27 that the US blockade has exacerbated Iran’s gasoline crisis by preventing Iran from importing gasoline to sufficiently address Iran’s fuel needs.[19] Gasoline shortages previously caused mass protests in 2019.[20]

**It is unclear, however, whether this pressure on Iran’s economy will cause Vahidi and his inner circle to make concessions to the United States.** Vahidi is an ideologue who has served in various capacities in the regime since the revolution. His ideological nature means he is more likely to judge ultimate success on whether or not he upholds the precepts of the Islamic Revolution. General economic pain imposed on the populace is unlikely to seriously affect his calculus, therefore, unless such economic pain threatens his current position or the regime’s stability.[21]

**Iran’s highest national security decision-making body is reportedly preparing for a potential protest wave as economic deterioration and social pressure intensify, according to anti-regime media.** Anti-regime media reported on April 28 that the Supreme National Security Council (SNSC) convened a meeting chaired by SNSC Secretary Mohammad Bagher Zolghadr—a close ally of Vahidi—after intelligence assessments warned of a possible resumption of protests in the coming days.[22] Unspecified sources told anti-regime media that Iran’s security institutions expressed concern about potential protest calls and assessed that worsening economic conditions, such as inflation, unemployment, and rising prices, could trigger renewed unrest.[23] The report stated that security agencies presented a highly critical picture of Iran’s economy, citing shutdowns in the oil, petrochemical, and steel sectors, widespread unemployment partly driven by internet disruptions, and a broader halt in economic activity due to the closure of financial markets.[24] These assessments warned that Iran’s economy cannot withstand more than six to eight weeks of a naval blockade and that reconstruction of damaged industrial sectors could take years.[25] The SNSC coordinates and authorizes the regime’s protest response, while internal security forces execute the crackdown.[26] Former Supreme Leader Ali Khamenei ordered the SNSC in January 2026 to crush the protests “by any means necessary.”[27]

Iran’s prolonged internet shutdown is also posing severe economic damage and accelerating unemployment, which likely increases pressure on regime stability. Iranian security institutions also assessed that approximately 20 percent of internet-dependent workers have lost their jobs and projected that up to two million additional private-sector workers could become unemployed by the end of spring.[28] An Iranian Chamber of Commerce official stated on April 14 that the internet shutdown is causing \$30 to \$40 million USD in “direct” daily losses and up to \$80 million USD when including “indirect” losses, which he argued is equivalent to the destruction of multiple major infrastructure assets each day.[29] NetBlocks reported on April 28 that Iran’s nationwide internet blackout, now exceeding 60 days, had severely disrupted financial transactions, commercial activity, and business operations.[30] NetBlocks estimates that the countrywide internet shutdown costs the Iranian economy over \$37 million USD per day.[31]

**Iranian Parliament Speaker Mohammad Bagher Ghalibaf appears to be trying to retain political support and remain a key actor in negotiations despite prior signs of opposition from Vahidi and his inner circle.** Two hundred and sixty-one Iranian Parliament members issued a statement on April 27 declaring support for Iran's negotiating team and Ghalibaf.[32] Parliamentarians added that they trust the negotiating delegation, especially Ghalibaf, and expressed support for its defense of national interests.[33] This statement follows recent reports indicating that Ghalibaf has grown frustrated with internal divisions and has considered resigning from the negotiating delegation.[34] Some outlets have claimed that he has already resigned due to disagreements over nuclear concessions.[35] Ghalibaf publicly defended negotiations on Iranian state television on April 18, arguing that diplomacy with the United States, alongside military power, is necessary to secure Iran's objectives.[36] Ghalibaf also criticized hardline officials, including SNSC member Saeed Jalili and hardline parliamentarian Amirhossein Sabeti, both affiliated with the ultraconservative Paydari (Stability) Front, for opposing negotiations.[37] Paydari Front-affiliated members of Parliament also did not sign the recent parliament statement.[38]

**Infighting among hardline factions has escalated into a public media confrontation amid intra-regime competition over negotiations. Intra-regime power struggle between pragmatic hardliners and ultrahardliners indicates the absence of a decisive central arbiter, which has allowed factional disputes to unfold publicly.** IRGC-affiliated Tasnim published an Op-Ed on April 24 and criticized negotiation expectations by arguing that talks aim to avoid war and its costs and must proceed based on the principles of "dignity, wisdom, and expediency." [39] Tasnim warned that some actors raise "unrealistic expectations," including full sanctions relief, a comprehensive ceasefire that includes the Axis of Resistance, long-term peace guarantees for Iran, and economic flourishing.[40] Tasnim warned that viewing negotiations through an "unrealistic expectations" lens reflects unrealistic wishful thinking. Ultraconservative Paydari (Stability) Front-affiliated Raja News accused Tasnim of downplaying the Supreme Leader's red lines by framing these demands as unrealistic and argued that Tasnim's proposed approach repeats the logic that led to the 2015 Joint Comprehensive Plan of Action because Tasnim depicts core demands such as full sanctions relief and a lasting ceasefire as "unattainable." [41] Raja News suggested that this logic resulted in "pure damage." [42] The lack of a decisive central authority due to Supreme Leader Mojtaba Khamenei's absence has likely allowed these disputes to escalate into the public domain rather than remain contained within regime channels.

**Iran continues to cooperate with key US adversaries, such as Russia and China, as it prepares for a potential resumption of conflict with the United States and Israel.** An Iranian defense delegation, including Defense Ministry Spokesperson Brigadier General Reza Talaei Nik, attended the Shanghai Cooperation Organization defense ministerial summit in Bishkek, Kyrgyzstan, on April 27 and 28.[43] The Iranian delegation held separate meetings with the Russian, Chinese, and Belarusian defense ministers on the sidelines of the summit.[44] Talaei Nik and Russian Defense Minister Andrey Belousov emphasized that Iran and Russia will continue to support each other "regardless of the situation." [45] The SCO summit comes after Iranian Foreign Affairs Minister Abbas Araghchi emphasized the importance of Russo-Iranian strategic relations in a meeting with Russian President Vladimir Putin in St. Petersburg on April 27.[46] These meetings may be part of a broader Iranian effort to secure support ahead of a potential resumption of conflict with the United States and Israel. Russia helped support Iranian strikes in the Middle East throughout the war, such as by providing Iran with satellite imagery of US, Gulf, and Turkish military assets in the Middle East.[47]

## Maritime Development

### **The US Navy has continued to demonstrate its ability to enforce its blockade on Iranian ports.**

US Central Command (CENTCOM) announced that a US Navy missile destroyer interdicted the Iranian-flagged OFAC-sanctioned *Stream* oil tanker (IMO: 9569633) after it attempted to sail to an Iranian port on April 26.[48] CENTCOM imagery of the *Stream* indicates that the vessel was empty, as it appears to sit much higher above the water line than fully loaded oil tankers typically do.[49] Iran could use empty oil tankers such as the *Stream* to temporarily relieve Iran's current onshore oil storage crisis (see above). Commercially available shipping data indicates the *Stream* turned off its automatic identification system (AIS) while departing from the Strait of Malacca on April 13.[50] Maritime intelligence organization Tanker Trackers reported that it geolocated satellite imagery of the *Stream* oil tanker in Pakistan's exclusive economic zone on April 24.[51] Tanker Trackers also reported that the *Stream* conducted a ship-to-ship transfer, probably to offload oil before returning to Iran, near the Strait of Malacca on April 13, before turning its AIS off.[52] CENTCOM confirmed that it is redirecting crude shipments that attempt to leave Iran back to an area near Chabahar, Iran.[53] Tanker Trackers reported that 10 Iranian tankers are currently near Chabahar.[54] CENTCOM separately announced on April 28 that US Marines boarded the Comoros-flagged *Blue Star III* container vessel (IMO: 9133147) in the Arabian Sea after CENTCOM suspected it of attempting to transit to Iran in violation of the US blockade on Iranian ports.[55] CENTCOM stated that US forces released the *Blue Star III* after conducting a search and confirming the ship's voyage would not include an Iranian port call.[56] The *Blue Star III* is not sanctioned by OFAC and does not appear to be sanctioned by any other body. CENTCOM stated on April 28 that it has redirected 39 Iranian or Iranian-linked vessels since the start of the blockade.[57]

## US and Israeli Air Campaign

*Nothing significant to report.*

## Iranian Response

*Nothing significant to report.*

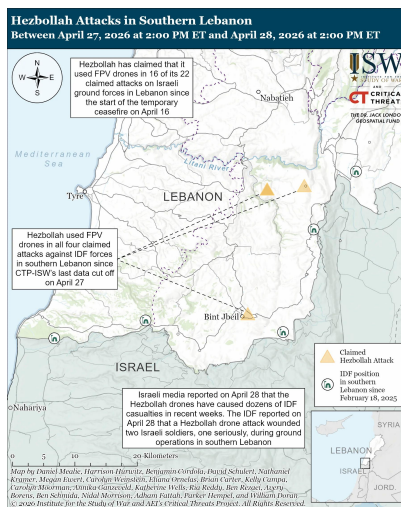
## Israeli Campaign Against Hezbollah and Hezbollah Response

### **The Israel Defense Forces (IDF) is reportedly examining first-person view (FPV) drone countermeasures for its units in southern Lebanon, amid Hezbollah's increased use of drones to target IDF units in southern Lebanon.[58]**

Commanders of IDF units deployed in southern Lebanon have acknowledged their units' limited ability to counter Hezbollah FPV drones.[59] A 282nd Artillery Brigade (36th Armored Division) officer said that Hezbollah's use of drones is "a significant operational challenge we are facing." [60] An unspecified IDF commander said that "there is not much you can do about [the drones]" except remain alert and shoot the drones down.[61] IDF soldiers have previously contended with FPV drones in Gaza against Hamas.[62] An Israeli Army Radio correspondent reported that some IDF units in southern Lebanon have begun to deploy anti-drone nets over positions, windows, and houses.[63] Israeli media reported on April 28 that the IDF established a special team to examine FPV drone countermeasures "a few weeks ago." [64] The IDF is examining the use of "lightweight acoustic radars" to improve IDF drone detection capabilities.[65] The IDF is also considering issuing IDF units in Lebanon with additional drone nets, equipping units with shotguns, and expanding

the use of the Israeli “Dagger” smart gun sight to increase accuracy when targeting incoming drones.[66] Ukrainian and Russian units have issued shotguns to anti-drone units as a drone countermeasure in their war, and extensively used drone nets to protect their forces against FPV drones.[67]

Hezbollah has increasingly used FPV drones to attack Israeli forces in Lebanon since the ceasefire came into effect on April 16. Hezbollah has claimed that it used FPV drones in 16 of its 22 claimed attacks on Israeli ground forces in Lebanon since April 16.[68] Hezbollah used FPV drones in all four claimed attacks against IDF forces in southern Lebanon since CTP-ISW’s last data cut off on April 27.[69] Israeli media reported on April 28 that the Hezbollah drones have caused dozens of IDF casualties in recent weeks.[70] The IDF reported on April 28 that a Hezbollah drone attack wounded two Israeli soldiers, one seriously, during ground operations in southern Lebanon.[71] A Hezbollah FPV drone attack also killed one IDF soldier and wounded six others in Taybeh, Marjaayoun District, on April 26.[72]



**Lebanese military officials claim that Israeli military action and Lebanese Armed Forces (LAF) deployments have constrained Hezbollah’s ability to smuggle weapons into Lebanon through Syria.**[73] An unnamed Lebanese military source told Saudi media on April 28 that the Beirut-Damascus International Highway’s closure since April 16 has hindered Hezbollah’s attempts to replenish its arms and ammunition stocks.[74] Lebanese authorities closed the highway after the IDF conducted an airstrike targeting a segment of the roadway in the vicinity of Dahr al Baidar, central Lebanon, shortly before the ceasefire came into effect on April 16.[75] The source also claimed that the LAF’s newly established checkpoints have “contributed to stopping the movement of weapons and ammunition” between Hezbollah units in central and southern Lebanon.[76] Syrian authorities have interdicted several shipments of Hezbollah arms and ammunition, including Iranian-origin weapons, bound for Lebanon since Hezbollah began targeting Israel on March 2.[77]

**Lebanese media reported on April 28 that Lebanese Parliament Speaker and longtime Hezbollah ally Nabih Berri privately supports Lebanese President Joseph Aoun’s stance on negotiations with Israel.**[78] Lebanese media reported that Berri is “on board” with Aoun’s efforts to extend the ceasefire and pursue direct Israel-Lebanon talks, but cannot announce his support out of concern that it may alienate Berri’s Shia constituency.[79] Berri has reportedly urged Aoun to ensure that negotiations with Israel guarantee a “real” ceasefire, Israel’s full withdrawal from southern Lebanon, the return of Lebanese prisoners from Israel, and reconstruction for southern Lebanon.[80] Berri and his political party, the Amal Movement, have historically aligned with Hezbollah, but Berri has distanced Amal from Hezbollah over disapproval of Hezbollah’s attacks on Israel.[81] Berri’s basic positions on the negotiations do not satisfy some key Israeli asks, however, such as the disarmament of Hezbollah. Amal supported the Lebanese government’s decision to ban Hezbollah’s military activities on March 2.[82]

# Other Axis of Resistance Response

**The Iraqi Shia Coordination Framework nominated the former Board Chairman of the al Janoob Islamic Bank, Ali Faleh al Zaidi, as Prime Minister Designate on April 27.**[83] The Central Bank of Iraq banned al Janoob Islamic Bank from US dollar transactions in 2024 to reduce fraud and money laundering, reportedly following a visit from a US Treasury Department official to Iraq.[84] Iraqi banks have historically facilitated money transfers that support Axis of Resistance operations, including attacks on US forces and allies.[85] Zaidi's nomination follows months of framework deliberations over the selection of the next prime minister.[86]

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# Iran Update Special Report, April 29, 2026



**Adham Fattah, Benjamin Schmida, Parker Hempel, William Doran, Nidal Morrison, Avery Borens, Ria Reddy, Katherine Wells, Brian Carter**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. Iran is unlikely to make meaningful concessions in its next proposal to the United States, which is expected in the next several days. Islamic Revolutionary Guards Corps (IRGC) Major General Ahmad Vahidi, whose hardline position on negotiations the regime has adopted, appears unwilling to concede on Iranian control over the Strait of Hormuz and Iran's nuclear program.
2. Mainstream Iranian politicians are consolidating around the decision to avoid discussing the nuclear issue before the United States lifts the naval blockade on Iranian ports, which was Vahidi's preferred policy outcome. Other Iranian regime factions do not appear to materially constrain Vahidi's uncompromising position.
3. The Iranian regime is likely attempting to modify and legitimize its plan to exert sovereignty over the Strait of Hormuz by including Oman in a scheme to collect tolls on shipping through the Strait. This would enable Iran to present a "new proposal" to the United States without compromising on any Iranian red lines. Oman rejected Iran's proposal, however.
4. Iranian leaders are preparing for a variety of contingencies and risks that could result from a hardline negotiating position that fails to end the war, including an economic collapse that triggers economic unrest, a long-term blockade, or a resumption of the US-Israeli air campaign.
5. Iran has responded to growing pressure on the economy caused by the war, sanctions, and the blockade by shoring up internal unity, presumably as an initial step in a more comprehensive internal security plan.
6. Iran is reportedly exploring alternative methods to circumvent the US blockade of its ports, which is a suboptimal way to alleviate some of the economic pressure, including seizing US commercial vessels or Israeli-linked vessels, relying on trade with Russia and other countries bordering the

Caspian Sea, or even the Houthis attacking vessels through the Bab el Mandeb Strait.

7. Iran has almost certainly used the ceasefire to reorganize and regenerate its missile and drone forces, which were badly degraded on the operational level prior to the ceasefire.

## Toplines

**Iran is unlikely to make meaningful concessions in its next proposal to the United States, which is expected in the next several days. Islamic Revolutionary Guards Corps (IRGC) Major General Ahmad Vahidi, whose hardline position on negotiations the regime has adopted, appears unwilling to concede on Iranian control over the Strait of Hormuz and Iran's nuclear program.** Iran's delegation told Pakistani mediators on April 27 that it needed to consult Supreme Leader Mojtaba Khamenei before responding with an updated proposal following US President Donald Trump's dissatisfaction with Iran's lack of nuclear concessions in its April 26 three-stage plan.[1] Vahidi maintains near-exclusive access to Mojtaba and serves as a gatekeeper who conveys Mojtaba's approval of decisions made by formal state institutions, according to several senior Iranian sources speaking to Western and anti-regime media in recent days.[2] The regime has adopted Vahidi's hardline positions on negotiations, which indicates that Vahidi has significantly more power within the regime and influence over the outcome of policy decisions compared to other leaders who are more supportive of negotiations. The extent to which Vahidi or any other regime leader controls the decision making process is unclear, even though Vahidi seems to have significant influence over the outcome.

Mainstream Iranian politicians are consolidating around the decision to avoid discussing the nuclear issue before the United States lifts the naval blockade on Iranian ports, which was Vahidi's preferred policy outcome. This illustrates that there is some level of political support for Vahidi's policies within the broader regime, which suggests Iran's negotiating stance will not soften in the near term. Mojtaba approved these policies in his role as supreme leader, but he lacks the stature of his father and has struggled to behave as a neutral arbiter in internal debates, according to Reuters.[3] Assembly of Experts members and members of parliament have voiced their support for Mojtaba's directive against discussing the nuclear issue before the US lifts the naval blockade on Iranian ports.[4] These statements reflect the same logic that led Iranian decision makers to withdraw the Iranian negotiators from the April 11 Islamabad negotiations.[5]

Other Iranian regime factions do not appear to materially constrain Vahidi's uncompromising position. Saeed Jalili — also on the SNSC — and his Stability (Paydari) Front continue to advocate an even more uncompromising stance against negotiations.[6] These ultra-hardliners reinforce Vahidi's position against concessions in negotiations. Parliamentary Speaker Mohammad Bagher Ghalibaf appears sidelined.[7] Ghalibaf's recent unity statement, urging loyalty to the supreme leader, followed by an unusual April 29 audio message reiterating support for the supreme leader, suggests he has acquiesced to the dominant hardline position on negotiations.[8] Reformist voices, such as Pezeshkian and former President Hassan Rouhani, who previously called for negotiations to prioritize Iran's economy, appear absent from the current decision making and information space, further narrowing the range of policy options.[9] The regime-imposed internet shutdown, presumably enforced by the IRGC, is almost certainly contributing to the absence of dissenting views.[10]

The Iranian regime is likely attempting to modify and legitimize its plan to exert sovereignty over the Strait of Hormuz by including Oman in a scheme to collect tolls on shipping through the Strait. This would enable Iran to present a "new proposal" to the United States without compromising on any Iranian red lines. Iranian Foreign Affairs Minister Abbas Araghchi reportedly traveled to Oman to again float a proposal to split administrative control of the strait. Oman rejected this offer, according to multiple US

and regional sources who spoke to the *New York Post* on April 29.[11] Araghchi's reported proposal corroborates CTP-ISW's previous assessments that Vahidi is prepared to risk a potential US military response and the continuation of the US naval blockade rather than concede in negotiations.[12]

**Iranian leaders are preparing for a variety of contingencies and risks that could result from a hardline negotiating position that fails to lift the economic and military pressure Iran is under.** Stalled negotiations could lead to an economic collapse that triggers economic unrest, a long-term blockade, or a resumption of the US-Israeli air campaign, among other courses of action that could become serious crises for the Iranian regime. None of these trajectories is mutually exclusive, and the preparations to meet each possible crisis will overlap.

**Iran has responded to growing pressure on the economy caused by the war, sanctions, and the blockade by shoring up internal unity, presumably as an initial step in a more comprehensive internal security plan.** The Iranian economy is under significant pressure, with the rial hitting a record low on April 29, on top of soaring costs, millions of job losses, and other challenges. Anti-regime media reported on April 28 that the Supreme National Security Council (SNSC) convened a meeting chaired by Zolghadr—a close ally of Vahidi—after intelligence assessments warned of a possible resumption of protests in the coming days due to growing economic pains on the Iranian people.[13] Such a meeting, if confirmed, likely sought to plan precautions to prevent widespread unrest given the timing and alleged subject matter. Islamic Republic of Iran Broadcasting published an audio message by Parliament Speaker Mohamad Bagher Ghalibaf on April 29 in which he emphasized the importance of the Iranian people's unity.[14] It is highly unusual for a high-ranking official to release just an audio message when addressing the public. Ghalibaf stated that the US strategy is to impose economic pressure via the naval blockade and sow internal divisions in order to get Iran to capitulate to US demands.[15] The intention of Ghalibaf's message is likely to place blame on the United States in order to build unity against an external enemy and prevent public outrage against the regime for Iran's dire economic conditions. Ghalibaf added that the blockade will likely continue until Iran and the United States have reached an agreement.[16] Ghalibaf's statement indicates that the regime's decision makers understand that it is unlikely US-Iran talks will reach an agreement and accept the prospects of resumed conflict with the United States. Ghalibaf's statement may also be a way to psychologically prepare the Iranian people that economic conditions will not improve in the near future. Building this internal unity could give way to a broader internal security plan that may or may not be visible in open-source reporting, given the internet blackout in Iran.

**Iran is reportedly exploring alternative methods to circumvent the US blockade of its ports, which is a suboptimal way to alleviate some of the economic pressure Iran is currently under.** Iranian Armed Forces General Staff (AFGS)-affiliated media Defa Press proposed multiple options Iran could utilize to break the US blockade on Iranian ports on April 29.[17] Defa said that Iran could seize US commercial ships or ships linked with Israel in retaliation for US forces interdicting several Iranian ships that violated the US blockade.[18] The Islamic Revolutionary Guards Corps (IRGC) Navy recently attacked and redirected two vessels towards Iran on April 22, in part, to extract concessions from the United States, such as ending the US blockade on Iranian ports.[19] Defa also hypothesized that Iran could circumvent the US blockade of Iranian ports by relying on trade with Russia and other countries bordering the Caspian Sea to export or import essential and strategic goods.[20] This report follows Iranian Foreign Minister Abbas Araghchi's meeting with Russian President Vladimir Putin in St. Petersburg on April 27.[21] This also follows an April 27 *Wall Street Journal* report that Iran is attempting to export oil to China via rail.[22] Defa also hinted that Iran could coordinate further with the Houthis to convince them to close the Bab al Mandab Strait to further constrain international shipping and impose costs on the United States and Israel.[23] CTP-ISW continues to assess that the Houthis are unlikely to impose a blockade on the Bab al Mandab, given it would likely jeopardize their domestic position, however.[24]

**The regime has also accepted the risk of and prepared for a resumption of the war.** Iran has almost certainly used the ceasefire to reorganize and regenerate its missile and drone forces, which were badly degraded on the operational level prior to the ceasefire.[25] This includes tasks such as digging out buried launchers, stockpiles, and launcher crews.[26] It also includes reorganizing command structures and removing incompetent commanders.[27] Other assets, like the factories and logistics apparatus that sustain these forces, will be difficult to rapidly reconstitute, however.

## Maritime Development

*See the topline section.*

## US and Israeli Air Campaign

*Nothing significant to report.*

## Iranian Internal Security

**Iran continues to face threats from anti-regime militant groups on its northwestern and southeastern borders.** IRGC Ground Forces dismantled a four-member “terrorist” cell in Kurdistan Province, northwestern Iran, on April 28, seizing their weapons and communications devices.[28] Likely Mobarizoun Popular Front (MPF) fighters attacked an IRGC vehicle in Rask, Sistan and Baluchistan Province on April 29.[29] The MPF is a coalition of Baloch anti-regime groups operating in southeastern Iran. Likely MPF fighters killed two Law Enforcement Command (LEC) officers in Zahedan, Sistan and Baluchistan Province, on April 29.[30] LEC officers also clashed with likely MPF fighters in Iranshahr, Sistan and Baluchistan Province, on April 29, and killed two fighters, wounding two others, and seized their weapons.[31]

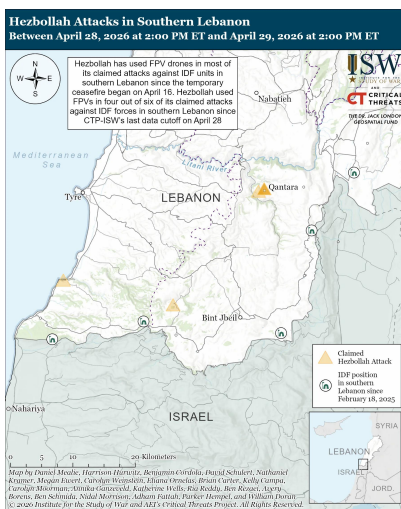
## Israeli Campaign Against Hezbollah and Hezbollah Response

**The Israel Defense Forces (IDF) is implementing battlefield adaptations to address the threat of Hezbollah’s first-person view (FPV) drones, amid Hezbollah’s increased use of FPV drones to target IDF units in southern Lebanon.** Israeli Army Radio reported that the IDF presented possible drone countermeasures for Israeli units operating in Lebanon to the Israeli Knesset in the past week.[32] The IDF discussed multiple drone countermeasures, including reducing the permitted amount of time an Israeli helicopter is allowed to land in Lebanon, deploying unspecified radar systems “extensively” inside the Israeli “security zone” in southern Lebanon to increase drone detection capability, and issuing additional smart gun sights and anti-drone nets to Israeli forces in Lebanon.[33] Hezbollah FPV drones targeted an Israeli helicopter that was evacuating casualties near Taybeh, Marjaayoun District, on April 26, which presumably triggered a review of standard operating procedure.[34] Israeli media reported on April 28 that the IDF is examining the use of “lightweight acoustic radars” to improve IDF drone detection capabilities.[35] Multiple open-source intelligence (OSINT) accounts published footage on April 28 that purportedly shows a rifle’s sight picture while using an Israeli Dagger smart gun sight mounted to an M4 rifle to improve their accuracy and shoot down two Hezbollah drones.[36] Israeli media and a Lebanese OSINT analyst published footage on April 29 of an Israeli unit using anti-drone netting to protect a vehicle operating in southern Lebanon.[37] Ukraine and Russia have extensively used anti-drone netting to

protect personnel and vehicles against FPV drones.[38] The IDF has upgraded certain IDF vehicles, including Merkava tanks, with anti-drone armor in response to Hamas's use of FPV drones in Gaza.[39]

**The rate of Hezbollah FPV attacks remains relatively low compared to the way both sides employ drones in Ukraine. The majority of Hezbollah's claimed attacks against IDF units have used FPV drones since the start of the temporary ceasefire on April 16, however.[40]**

Hezbollah used FPVs in four out of six claimed attacks against IDF forces in southern Lebanon since CTP-ISW's last data cut off on April 28.[41] 1st (Golani) Infantry Brigade (36th Armored Division) soldiers seized a Hezbollah weapons cache that included partially assembled FPV drones, remote detonators, and rocket-propelled grenade (RPG) warheads in southern Lebanon on April 27.[42] The seizure of the partially assembled FPV drones, spare drone components, and RPG-7 warheads suggests that Hezbollah is at least partially assembling its drones domestically, rather than receiving pre-assembled drones from Iran.



**Israeli leaders have asked the United States not to extend the temporary ceasefire in Lebanon past its scheduled expiration on May 17, according to Israeli media.[43]**

Unnamed Israeli political officials argued on April 29 that the IDF's current restraint under the ceasefire is weakening Israeli deterrence against Hezbollah, whose attacks are "undermining the prospects of reaching agreements" with the Lebanese government.[44] The Israeli government asked US President Donald Trump to approve of expanded IDF operations in Lebanon if negotiations with the Lebanese government do not "bear fruit" by May 17.[45] IDF Chief of Staff Eyal Zamir said during a visit to Israeli soldiers in Taybeh, Marjaayoun District, that there is "no ceasefire" in Lebanon and cited Hezbollah's attacks targeting Israeli soldiers in southern Lebanon and communities in northern Israel.[46] Zamir said that the IDF will conduct military action against all threats to Israeli soldiers and civilians, including targets north of the Litani River and outside the IDF's buffer zone in southern Lebanon.[47]

**An Israeli airstrike killed three Lebanese Civil Defense personnel during a search-and-rescue mission in southern Lebanon on April 28, according to Lebanese authorities.[48]**

The IDF conducted two successive airstrikes targeting a building in Majdal Zoun, in Lebanon's South Province.[49] The Lebanese Civil Defense said that its rescuers were responding to civilian casualties from the IDF's first airstrike on Majdal Zoun when a second airstrike trapped and killed the rescuers.[50] Lebanese Prime Minister Nawaf Salam called the IDF airstrikes on Majdal Zoun a "flagrant violation of the principles and rules of international humanitarian law." [51]

## Other Axis of Resistance Response

**Likely Iranian-backed Iraqi militia front group Saraya Awliya al Dam released fiber-optic FPV drone footage on April 28 showing an attack targeting a communications tower at Camp Victory, a former US military base located at Baghdad International Airport, on April 8.[52]**

This militia previously conducted two FPV drone attacks targeting fuel tanks at Camp Victory on April 2 and 7.[53] Iranian-backed Iraqi militias repeatedly targeted Baghdad International Airport and its co-located facilities, including Camp Victory and the diplomatic support center, before the US-Iran ceasefire.[54]

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# Iran Update Special Report, April 30, 2026



**Katherine Wells, Parker Hempel, Ben Rezaei, William Doran, Adham Fattah, Carolyn Moorman, Annika Ganzeveld**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. Supreme Leader Mojtaba Khamenei declared on April 30 that Iran will retain control over shipping through the Strait of Hormuz and maintain its nuclear and missile capabilities, which supports ISW-CTP's assessment that the Iranian regime is unlikely to make meaningful concessions in its next proposal to the United States.
2. Some Iranian officials who have advocated for a "pragmatist" approach toward negotiations may be aligning themselves behind Vahidi's redlines, which Mojtaba publicly endorsed in his April 30 statement. Foreign Affairs Minister Abbas Araghchi has reportedly been acting in "full coordination" with Vahidi and following Vahidi's "instructions" over the past two weeks, according to two informed sources speaking to anti-regime media on April 30. This report suggests that Araghchi may have aligned himself with Vahidi's position on negotiations.
3. Parliament Speaker Mohammad Bagher Ghalibaf and President Masoud Pezeshkian are reportedly dissatisfied with Araghchi's close cooperation with Vahidi and approach toward negotiations, even though they have publicly signaled their acquiescence to Vahidi's hardline approach.
4. Iran is trying to sow divisions between the Gulf states and the United States as part of a longstanding Iranian effort to push the Gulf countries to expel US forces from their territory.

## Toplines

**Supreme Leader Mojtaba Khamenei declared on April 30 that Iran will retain control over shipping through the Strait of Hormuz and maintain its nuclear and missile capabilities,**

**which supports ISW-CTP's assessment that the Iranian regime is unlikely to make meaningful concessions in its next proposal to the United States.**[1] Mojtaba published a written statement on April 30 in which he stated that Iran will implement a “new management” in the strait—likely in reference to Iran’s collection of tolls from vessels that transit the strait—as a means to “secure” the Persian Gulf and prevent “hostile” interference in the region.[2] Mojtaba also underscored that Iran will defend its nuclear, missile, and advanced technological capabilities as resolutely as it defends its territorial borders.[3] A senior Iranian official speaking to the *Washington Post* on April 30 similarly asserted that Iran’s security establishment rejects compromise on key matters, such as Iran’s ability to enrich uranium.[4] Mojtaba’s statement and the *Washington Post* report are consistent with ISW-CTP’s assessment that IRGC Commander Major General Ahmad Vahidi, who appears to be dominating regime decision-making, is unwilling to make concessions regarding Iran’s control over the Strait of Hormuz or nuclear program.[5] Vahidi reportedly maintains near-exclusive access to Mojtaba and serves as a gatekeeper who conveys Mojtaba’s approval of decisions.[6] Pakistani mediators told Western media that Iran is expected to send them a revised proposal on May 1.[7]

**Some Iranian officials who have advocated for a “pragmatist” approach toward negotiations may be aligning themselves behind Vahidi’s redlines, which Mojtaba publicly endorsed in his April 30 statement.** Foreign Affairs Minister Abbas Araghchi has reportedly been acting in “full coordination” with Vahidi and following Vahidi’s “instructions” over the past two weeks, according to two informed sources speaking to anti-regime media on April 30.[8] This report suggests that Araghchi may have aligned himself with Vahidi’s position on negotiations despite previous disputes in which Araghchi called negotiations that did not address Iran’s nuclear program a “death sentence.”[9] Araghchi’s reported coordination with Vahidi in recent weeks is consistent with an April 30 *Washington Post* report, citing an unspecified Iranian official, that Iranian officials “yielded to pressure” from military and political hardliners to “deprioritize negotiations” after the United States and Iran failed to reach a deal during the first round of negotiations on April 11 and 12.[10]

**Parliament Speaker Mohammad Bagher Ghalibaf and President Masoud Pezeshkian are reportedly dissatisfied with Araghchi’s close cooperation with Vahidi and approach toward negotiations, even though they have publicly signaled their acquiescence to Vahidi’s hardline approach.**[11] Two informed sources speaking to anti-regime media on April 30 claimed that Pezeshkian and Ghalibaf believe that Araghchi has increasingly served as an assistant to Vahidi rather than as a cabinet official implementing government policy.[12] The sources said that Araghchi has coordinated closely with Vahidi and acted on his instructions over the past two weeks without informing Pezeshkian.[13] Araghchi recently visited Pakistan, Oman, and Russia without Ghalibaf. ISW-CTP observed that Ghalibaf’s absence was notable because Ghalibaf had led the Iranian negotiating delegation in the first round of talks.[14] Pezeshkian has reportedly privately indicated to close associates that he would consider removing Araghchi from his post if the situation persists, according to the informed sources.[15] Pezeshkian and Ghalibaf’s private dissatisfaction with Araghchi comes after both officials publicly signaled their acquiescence to Vahidi’s hardline approach toward negotiations in the past week.

**Iran is trying to sow divisions between the Gulf states and the United States as part of a longstanding Iranian effort to push the Gulf countries to expel US forces from their territory.**[16] Supreme Leader Mojtaba Khamenei claimed in his April 30 statement that the US military presence in the Persian Gulf is “the most important factor” driving regional insecurity.[17] Mojtaba also claimed that US bases in the region cannot defend the United States’ Gulf partners.[18] Iran repeatedly attacked energy and other infrastructure in the Gulf states during the war, citing the presence of US bases in these countries as justification for its attacks.[19] Mojtaba’s statement is consistent with recent statements from other Iranian officials that have similarly sought to distance the Gulf states from the

United States. An Iranian parliamentarian recently implicitly threatened that Iran would attack the Gulf states if the United States resumed conducting strikes on Iran.[20] The IRGC separately issued a statement on April 30 that called on the Gulf countries to participate in regional affairs without the presence of foreign powers and expressed optimism about expelling US forces from the region.[21]

## Maritime Development

**US Central Command (CENTCOM) Commander Admiral Brad Cooper stated that US forces have redirected 42 vessels attempting to violate the US blockade on Iranian ports as of April 29.[22]** Cooper added that the blockade has prevented Iran from selling 69 million barrels of oil, which amounts to over \$6 billion USD in blocked revenue.[23] Cooper stated that the blockade is “highly effective” and that US forces remain “fully committed” to enforcing it.[24]

## US and Israeli Air Campaign

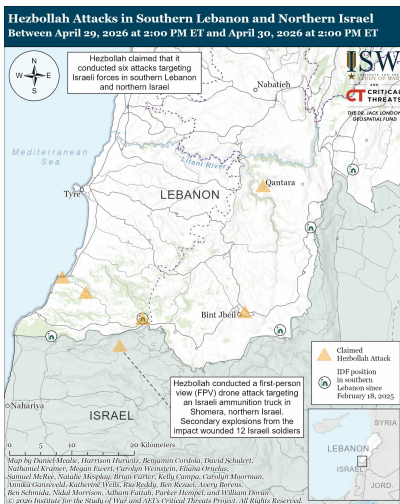
*Nothing significant to report.*

## Iranian Response

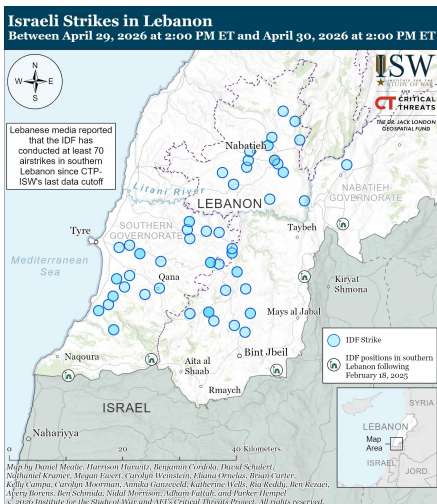
*Nothing significant to report.*

## Israeli Campaign Against Hezbollah and Hezbollah Response

**Hezbollah has continued to target Israeli forces and military assets using first-person view (FPV) drones.[25]** Hezbollah claimed that it used FPV drones in five of its six attacks targeting Israeli forces since ISW-CTP’s last data cutoff on April 29.[26] One Hezbollah FPV drone attack killed an Israeli 1st (Golani) Brigade (36th Division) soldier in Qantara, Marjaayoun District, on April 30.[27] Hezbollah uses FPV drones to target individuals and small groups of Israeli soldiers because they are difficult to intercept and can strike targets with high precision.[28] Another Hezbollah FPV drone struck an Israeli artillery munitions vehicle in Shomera, about one mile south of the Israel-Lebanon border in northern Israel, on April 30.[29] Hezbollah claimed that the attack targeted Israeli artillery south of Yarine, in southern Lebanon’s Tyre District.[30] An Israeli military correspondent reported that the attack was Hezbollah’s first successful FPV drone strike on northern Israel since Hezbollah began targeting Israel on March 2.[31] The drone impact caused secondary explosions from the vehicle’s stored munitions, which wounded 12 Israeli soldiers.[32] The correspondent reported that the IDF is investigating whether Hezbollah used an FPV drone equipped with a fiber-optic cable in the attack.[33] Fiber-optic FPV drones are immune to jamming, and Israeli media reported on April 27 that Hezbollah’s fiber-optic drones have an operational range of 15 kilometers.[34] Israeli media reported on April 28 that the IDF is exploring potential countermeasures that it can deploy at scale to protect Israeli forces from Hezbollah FPV drone attacks.[35]



**US President Donald Trump told Israeli Prime Minister Benjamin Netanyahu on April 29 to constrain Israeli military activity in southern Lebanon, amid US plans to strengthen the Lebanese government’s capability to disarm Hezbollah.**[36] Trump told Netanyahu that the IDF should only conduct “surgical” military operations in Lebanon and avoid resuming “a full war.”[37] The IDF has continued to conduct airstrikes and demolitions in southern Lebanon since the beginning of the temporary ceasefire on April 16.[38] The temporary ceasefire agreement stipulates that Israel will not conduct any offensive military operations but grants Israel the right to act in self-defense against any “planned, imminent, or ongoing” Hezbollah threats against Israel.[39] Lebanese media reported that the IDF conducted at least 70 airstrikes in southern Lebanon since ISW-CTP’s data cutoff on April 29.[40] US officials have recently indicated that the United States is planning to strengthen the Lebanese Armed Forces’ (LAF) ability to disarm Hezbollah.[41] A US official told Axios on April 29 that the United States is going to “massively increase our political campaign against Hezbollah” and is looking for ways to strengthen the LAF on “a very rapid schedule.”[42] US Secretary of State Marco Rubio told Fox News on April 27 that the US is working to establish a program to train and equip “vetted” LAF units to “go after elements” of Hezbollah and disarm the group.[43]



**Israeli officials have warned the United States that the IDF could resume broad military operations in Lebanon in the coming weeks due to Hezbollah’s continued attacks on the IDF in southern Lebanon and northern Israeli communities.** Israeli media reported on April 29 that Netanyahu asked Trump to limit Israel-Lebanon negotiations to the next two to three weeks.[44] The temporary ceasefire is set to expire on May 17.[45] Israeli officials have reportedly told US officials that the IDF will resume its “original plan” to expand military operations against Hezbollah in Lebanon if

negotiations fail to produce results.[46] Axios reported on April 29 that the Israeli government is under pressure to respond to Hezbollah’s continued rocket and drone attacks in southern Lebanon and northern Israel during the ceasefire.[47] IDF Northern Command Commander Major General Rafi Milo told the heads of northern Israeli communities that the IDF is “aware of the mood at home, this is a long war.”[48] Milo also said that the Israeli military campaign in Lebanon “will not end today or tomorrow, the activity will continue for many months and we need to prepare for that.”[49] Israeli Foreign Minister Gideon Saar told Saudi media on April 29 that Israel will withdraw from southern Lebanon once there is an “effective government and military authority” in Lebanon.[50] Rubio told Fox News on April 27 that he does not believe Israel wants to remain in southern Lebanon indefinitely.[51] Rubio stated that Israel wants a strong Lebanese government that can dismantle Hezbollah.[52]

## Other Axis of Resistance Response

**Air defense systems shot down at least one Iranian-backed Iraqi militia reconnaissance drone near the US Embassy in Baghdad on April 29, according to Iraqi security sources speaking to Reuters.[53]** Open-source intelligence accounts reported that air defense systems intercepted two Iranian-backed Iraqi militia reconnaissance drones near the embassy.[54] No Iranian-backed Iraqi militia has claimed responsibility for the reconnaissance drone at the time of this writing.

POWERED BY:  BABEL STREET

### Endnotes

- [1] [https://t.me/rahbar\\_enghelab\\_ir/313](https://t.me/rahbar_enghelab_ir/313);  
<https://understandingwar.org/research/middle-east/iran-update-special-report-april-29-2026/>
- [2] [https://t.me/rahbar\\_enghelab\\_ir/313](https://t.me/rahbar_enghelab_ir/313)
- [3] [https://t.me/rahbar\\_enghelab\\_ir/313](https://t.me/rahbar_enghelab_ir/313)
- [4] <https://www.washingtonpost.com/politics/2026/04/30/trump-iran-standoff-strait-hormuz/>
- [5] <https://understandingwar.org/research/middle-east/iran-update-special-report-april-25-2026/>
- [6] <https://www.nytimes.com/2026/04/23/world/middleeast/iran-new-leadership-generals.html>
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- [10] <https://www.washingtonpost.com/politics/2026/04/30/trump-iran-standoff-strait-hormuz/>
- [11] <https://www.iranintl.com/202604301776>

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- [17] [https://t.me/rahbar\\_enghelab\\_ir/313](https://t.me/rahbar_enghelab_ir/313)
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- [20] <https://x.com/IranIntl/status/2049814560824001019?s=20>
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- [22] <https://x.com/CENTCOM/status/2049594027582832881>
- [23] <https://x.com/CENTCOM/status/2049594027582832881>
- [24] <https://x.com/CENTCOM/status/2049594027582832881>
- [25] <https://t.me/mmirleb/15625> ; <https://t.me/mmirleb/15631> ; <https://t.me/mmirleb/15632> ;  
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- [27] <https://t.me/mmirleb/15632> ; <https://x.com/manniefabian/status/2049869354519474363?s=20>
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# Iran Update Special Report, May 1, 2026



**Ben Rezaei, Katherine Wells, Avery Borens, Carolyn Moorman, William Doran, Ria Reddy, Annika Ganzeveld**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. US President Donald Trump stated that he is “not satisfied” with Iran’s latest proposal. Trump’s dissatisfaction with Iran’s latest proposal reflects continued Iranian inflexibility on key issues, such as the nuclear program and the Strait of Hormuz.
2. Iran is exploiting the current ceasefire to try to reconstitute its missile and drone capabilities ahead of a potential resumption of conflict. Western media reported that Iran has made attempts to regain access to weapons and missile launchers that it hid underground or were buried under debris from US and Israeli airstrikes. Iran would likely use these launchers to restart its attack campaign against US interests, Israel, and other regional countries in the event of a resumption of conflict.
3. Iranian media and officials are attempting to deflect responsibility for Iran’s dire economic conditions by attributing these conditions to US military and economic pressure. The US naval blockade and sanctions are certainly applying economic pressure on Iran, but the regime’s historical mismanagement of the economy, corruption, and the Islamic Revolutionary Guard Corps (IRGC)’s dominance over economic institutions have played a major role in deteriorating the Iranian economy.

## Toplines

**US President Donald Trump stated that he is “not satisfied” with Iran’s latest proposal.[1]**  
Iranian media reported on May 1 that Iran submitted a new proposal to the United States through

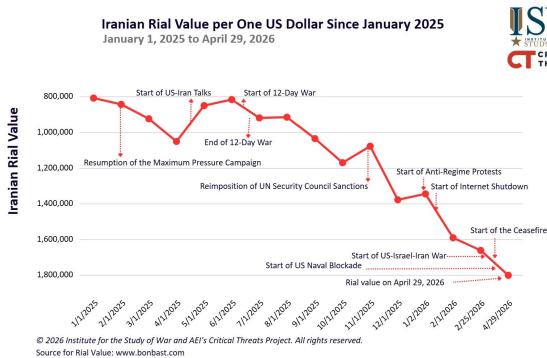
Pakistani mediators on April 30.[2] An unspecified regional source told Axios on May 1 that Iran delivered its response to the United States' amendments to Iran's previous proposal.[3] The source stated that US Special Envoy to the Middle East Steve Witkoff had sent amendments to Iran on April 27 that called on Iran to reinsert nuclear issues into the draft proposal and avoid moving enriched uranium from bombed facilities or resuming activity at those sites during negotiations.[4] Iran's previous proposal had sought to postpone US-Iran negotiations about nuclear issues to a later date.[5] Trump's dissatisfaction with Iran's latest proposal reflects continued Iranian inflexibility on key issues, such as the nuclear program and the Strait of Hormuz. The *Wall Street Journal* reported on May 1 that Iran's latest proposal calls for discussing "Tehran's conditions for opening the Strait of Hormuz at the same time as US guarantees to end its attacks and unwind its blockade of Iranian ports." [6] The *Wall Street Journal* noted that Iran had previously made the removal of the US blockade a precondition for talks.[7] A *Wall Street Journal* reporter separately stated that Iran's proposal "still puts nuclear [issues] in later stages of talks" and "rules out missile negotiations." [8] Iranian officials have continued to reiterate that the nuclear file is "closed" and not subject to negotiations.[9] First Deputy Parliament Speaker Ali Nikzad stated that the Strait of Hormuz will not return to its previous state and framed both the strait and nuclear advancements as Iranian "rights." [10] Supreme Leader Mojtaba Khamenei's Telegram channel separately framed Iranian control over the Strait of Hormuz as a core pillar of Iran's regional strategy, which suggests that the regime has not softened its position on the Strait of Hormuz.[11]

**Iran is exploiting the current ceasefire to try to reconstitute its missile and drone capabilities ahead of a potential resumption of conflict.** An unspecified US official and two people familiar with the matter told NBC News on May 1 that Iran is trying to recover weapons that it hid underground or were buried under debris from US and Israeli airstrikes.[12] CNN previously reported on April 14 that satellite imagery showed that Iran was clearing debris at missile base entrances to regain access to missile launchers.[13] Iran would likely use these launchers to restart its attack campaign against US interests, Israel, and other regional countries in the event of a resumption of conflict.

Two unspecified senior Iranian sources separately told Reuters on May 1 that Iran has activated air defenses and plans to conduct a "wide" response if attacked.[14] The officials stated that Iran assesses that the United States may conduct "short, intensive" strikes followed by Israeli action.[15] Islamic Revolutionary Guards Corps (IRGC)-affiliated media reported on April 30 that Iranian air defenses activated across multiple areas of Tehran Province to counter small drones and reconnaissance drones.[16] US and Israeli combined strikes have significantly degraded Iran's air defense capabilities during the war.[17]

**Iranian media and officials are attempting to deflect responsibility for Iran's dire economic conditions by attributing these conditions to US military and economic pressure.** An Iranian media outlet criticized what it called a coordinated psychological campaign by anti-regime media to portray Iran as facing socio-economic collapse, political deadlock, and the threat of renewed protests as part of a broader US information operation against Iran.[18] The outlet's criticism followed a report from anti-regime media that the Supreme National Security Council recently met to discuss the potential for protests triggered by Iran's poor economic conditions.[19] This report came as Iran's currency plunged to a record low of roughly 1.8 million rials to one US dollar on April 29.[20] Iranian officials continue to blame the US naval blockade on Iranian ports and additional US sanctions for Iran's poor economic conditions. The blockade and US sanctions are certainly applying economic pressure on Iran, but the regime's historical mismanagement of the economy, corruption, and the IRGC's dominance over economic institutions have played a major role in deteriorating the Iranian economy. Supreme Leader Mojtaba Khamenei, Parliament Speaker Mohammad Bagher Ghalibaf, and President Masoud Pezeshkian have publicly argued in recent days that US actions are constricting Iran's economy.[21] Mojtaba argued on April 30 that Iran's "management" of traffic through the Strait of Hormuz, presumably including the

extraction of tolls from vessels that transit through the strait, is necessary to bolster the Iranian economy and enhance regional stability.[22] The US Treasury Department warned on May 1 that it could sanction vessels that pay tolls to Iran to transit through the strait.[23] Iranian leadership under IRGC Commander Major General Ahmad Vahidi appears to be dismissing concerns raised by “pragmatist” regime officials about the state of the Iranian economy.[24] Vahidi appears to view maintaining control over the Strait of Hormuz and retaining Iran’s nuclear program as necessary for Iran’s long-term interests, even at the cost of foregoing short-term economic relief through an agreement with the United States.



## Maritime Development

**US Central Command (CENTCOM) reported on May 1 that US forces have directed 45 vessels to turn around or return to port since the start of the US blockade on Iranian ports.[25]**

## US and Israeli Air Campaign

*Nothing significant to report.*

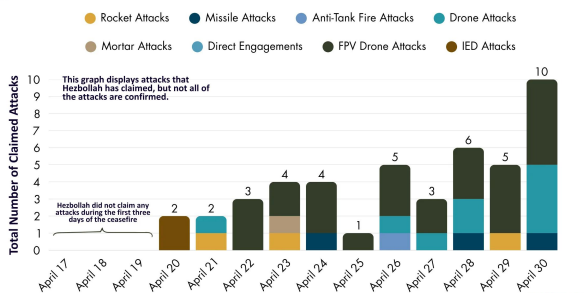
## Iranian Internal Dynamics

**The US Treasury Department designated Iranian entities involved in sanctions evasion on May 1 as part of the broader US economic pressure campaign against Iran.[26]** The US Treasury Department designated three Iranian banking networks and their associated front companies for their involvement in Iranian sanctions evasion.[27] The US Treasury Department noted that these entities conduct tens of billions of US dollars’ worth of trade annually within Iran’s “shadow banking” network.[28] These designations follow the US Treasury Department’s designation of 35 entities and individuals involved in Iran’s shadow banking network on April 28.[29] The United States has also targeted Iran’s cryptocurrency sector, which Iran also uses to evade US sanctions. The US Treasury Department froze \$344 million (USD) in cryptocurrency linked to Iran on April 29.[30] A US official told CNN that the Central Bank of Iran uses digital assets to obfuscate its involvement in cross-border transactions.[31] Reuters reported on May 1 that Iran’s largest cryptocurrency exchange company, Nobitex, has processed between tens and hundreds of millions of dollars in transactions linked to the Central Bank of Iran and the IRGC.[32]

# Israeli Campaign Against Hezbollah and Hezbollah Response

**Hezbollah has continued to target Israeli forces and military assets using drones, including first-person view (FPV) drones.**[33] Hezbollah claimed that it used drones in eight of its twelve attacks targeting Israeli forces since ISW-CTP 's last data cutoff on April 30.[34] Hezbollah claimed that it used FPV drones in four of its drone attacks, all of which targeted Israeli forces and vehicles in southern Lebanon.[35] An Israeli journalist reported that a Hezbollah FPV drone impacted near Misgav Am, northern Israel, on May 1, injuring two individuals.[36] Hezbollah has increasingly employed FPV drones in its attacks against Israeli targets since April 22 (see graphic below).[37] The *Wall Street Journal* reported on April 30 that Hezbollah began to employ FPV drones in attacks against Israeli targets as early as June 2024 but stopped using these drones after the start of the Fall 2024 conflict.[38] An Israeli reservist operating in southern Lebanon told the *Wall Street Journal* on April 30 that Hezbollah flies FPV drones near Israeli forces at least 10 times per day.[39] A senior Hezbollah official told the *New York Times* on April 30 that FPV drones have made Israeli forces “easy targets.”[40] Hezbollah’s Loyalty to the Resistance Bloc stated on May 1 that Hezbollah is conducting attacks to prevent the Israel Defense Forces (IDF) from establishing a security zone in southern Lebanon.[41] The bloc added that Hezbollah seeks to create a “new equation” in Lebanon that prevents the IDF from conducting operations “without a painful retaliatory response” to increase Hezbollah’s deterrence against Israel.[42]

**Hezbollah-Claimed Attacks Between April 17, 2026 and April 30, 2026 By Type**

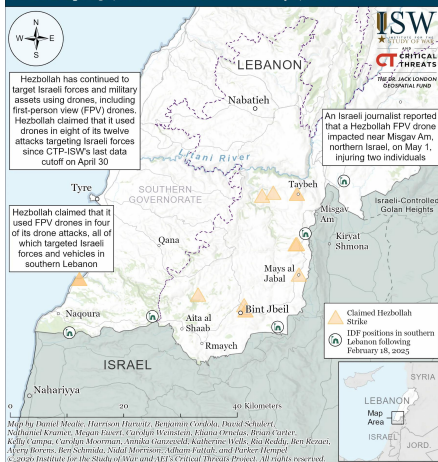


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Note: There are some attacks in which Hezbollah did not specify the type of weaponry it used



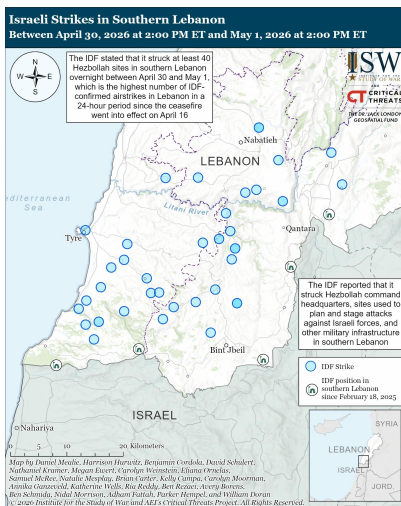
**Hezbollah Attacks in Lebanon**  
Between April 30, 2026 at 2:00 PM ET and May 1, 2026 at 2:00 PM ET



**The IDF has continued to take steps to counter and mitigate the threat of Hezbollah FPV drones.** Israeli soldiers in southern Lebanon told the *Wall Street Journal* on April 30 that Israeli forces are “improvising solutions” to combat Hezbollah FPV drones, including covering military equipment and outposts with nets to trap the drones.[43] Israeli media reported on May 1 that the Israeli Air Force (IAF)

is assisting Israeli ground forces in southern Lebanon by deploying mobile radars to detect FPV drones.[44] The IAF has shot down at least 27 FPV drones as of May 1 using Israel’s short-range Iron Dome air defense system, according to Israeli media.[45] Israeli media also reported on May 1 that the IDF is experimenting with “various industrial systems” to intercept FPV drones.[46] Israeli Prime Minister Benjamin Netanyahu recently stated that he ordered the formation of a “special project” to counter the FPV drone threat but noted that “it will take time” to counter this threat.[47] The Israeli Defense Ministry similarly called for proposals to identify ways to combat the threat of fiber-optic FPV drones.[48] Hezbollah has previously posted footage of Hezbollah fighters operating fiber-optic FPV drones, which are immune to jamming.[49] An Israeli military official told the *New York Times* on April 30 that Hezbollah’s fiber-optic drones have an operational range of 15 to 20 kilometers.[50]

**The IDF announced that it conducted airstrikes targeting at least 40 Hezbollah sites in southern Lebanon overnight between April 30 and May 1.[51]** This is the highest number of IDF-confirmed airstrikes in Lebanon in a 24-hour period since the ceasefire went into effect on April 16. The IDF reported that it struck Hezbollah command headquarters, sites used by Hezbollah to plan and stage attacks against Israeli forces, and other military infrastructure in southern Lebanon.[52] The IDF warned that it will continue to target any threats to Israeli forces and civilians. [53]



## Other Axis of Resistance Response

**United Kingdom Maritime Trade Operations (UKMTO) reported that seven unidentified armed individuals in a skiff approached a bulk carrier 92 nautical miles southwest of al Mukalla, Yemen, on May 1.[54]** No actor has claimed responsibility for this incident at the time of this writing.



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# Iran Update Special Report, May 2, 2026



**Katherine Wells, Avery Borens, Ben Rezaei, Carolyn Moorman, Ria Reddy, Annika Ganzeveld**

**Analyst Notes:** Data Cutoff: 2:00 PM ET

*The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes. The updates cover events from the past 24-hour period.*

*NOTE: ISW-CTP will continue posting morning social media threads on an as-needed basis starting April 28, 2026, for the duration of the ceasefire. We will continue providing long-form analysis on the state of the Iran War in our daily Iran Update Special Reports.*

## Key Takeaways

1. Iran does not appear to have altered its negotiating position over the management of the Strait of Hormuz and its nuclear program in its latest proposal. Some elements of the Iranian regime may calculate that Iran can impose sufficient economic and political costs on the United States to coerce the United States to make concessions.
2. Iran is taking steps to try to withstand the US naval blockade. Iran has reportedly begun reducing its oil production as its storage capacity reaches its limits. Iran is likely reducing oil production rather than halting it because shutting down oil production could cause significant damage to Iranian oil fields.
3. Hezbollah may be domestically producing first-person view (FPV) drones. Hezbollah posted footage on May 2 showing Hezbollah fighters domestically producing drones, but it is unclear if the drones in the video are FPV drones. Hezbollah's video comes after an Israeli military official told the Associated Press on April 30 that Israel believes that Hezbollah is domestically manufacturing FPV drones.

## Toplines

**Iran does not appear to have altered its negotiating position over the management of the Strait of Hormuz and its nuclear program in its latest proposal. Some elements of the Iranian regime may calculate that Iran can impose sufficient economic and political costs on the United States to coerce the United States to make concessions.** Two senior Iranian officials told the *New York Times* on May 1 that Iran's new proposal, which Iran submitted to the United States via

Pakistani mediators on April 30, removed a previous condition that required the United States to lift its naval blockade on Iranian ports before Iran and the United States could begin negotiations.[1] Iran's proposal also reportedly states that Iran is willing to "open" the Strait of Hormuz before the United States announces an end to its blockade.[2] Iran similarly offered to "open" the strait in its previous proposal on April 26, but caveated that it would charge vessels a toll to transit through the strait.[3] Iranian officials have not publicly indicated that the regime will abandon its proposed toll scheme. Supreme Leader Mojtaba Khamenei stated on April 30 that Iran will impose a "new management" in the strait that will reap "economic benefits" for Iran, for example.[4] Iran's latest proposal also pushes discussions over nuclear issues to a later stage, similar to Iran's April 26 proposal.[5] ISW-CTP previously noted that any proposal that pushes nuclear negotiations to a later stage would not force Iran to make concessions regarding its highly enriched uranium (HEU) stockpile or ability to enrich uranium up front, but would rather grant Iran more time to engage in talks about these issues.[6] US President Donald Trump expressed dissatisfaction with Iran's revised proposal on May 1.[7]

Iranian Armed Forces General Staff-run Defa Press argued on May 2 that the war between the United States and Iran has shifted from a direct conflict to a conflict focused on the "imposition of costs." [8] Defa Press argued that "patience" will be one of the "ultimate determinants of victory," which suggests that some elements of the regime may be willing to endure the United States' economic and military pressure while simultaneously imposing economic and political costs on the United States to try to pressure the United States to soften its negotiating demands.

**Senior Iranian military and security officials have also expressed pessimism about the prospects for compromise between Iran and the United States.** Khatam ol Anbia Central Headquarters Coordination Deputy Brigadier General Mohammad Jafar Asadi and an Iranian security official speaking to Agence-France Presse (AFP) both described renewed military conflict between Iran, the United States, and Israel as "likely" and emphasized that Iranian armed forces remain on full alert.[9] The Khatam ol Anbia Central Headquarters is responsible for joint and wartime operations.

**Iran is taking steps to try to withstand the US naval blockade.** Iran has begun reducing its oil production as its storage capacity reaches its limits, according to a senior Iranian official speaking to Bloomberg on May 2.[10] Iran is likely reducing oil production rather than halting it because shutting down oil production could cause significant damage to Iranian oil fields.[11] Pentagon officials told Axios on May 1 that 31 tankers carrying roughly 53 million barrels of Iranian oil, worth at least \$4.8 billion USD, remain in the Persian Gulf because of the US naval blockade on Iranian ports.[12] The United States has simultaneously expanded economic sanctions to deepen Iran's isolation and restrict its access to energy markets and financial channels.[13]

**Hezbollah may be domestically producing first-person view (FPV) drones.** Hezbollah posted footage on May 2 showing Hezbollah fighters domestically producing drones, but it is unclear if the drones in the video are FPV drones.[14] Hezbollah's video comes after an Israeli military official told the Associated Press on April 30 that Israel believes that Hezbollah is domestically manufacturing FPV drones.[15] The official noted that FPV drones are relatively easy to produce and require minimal additional parts compared to non-FPV drones.[16] Hezbollah has had the ability to domestically produce drones since at least 2011, and prioritized domestic drone production following the Fall 2024 conflict.[17] Israeli media also reported on May 1 that Israel Defense Forces (IDF) Chief of Staff Lieutenant General Eyal Zamir instructed the IDF to target Hezbollah's FPV drone production and supply chain infrastructure "beyond southern Lebanon." [18]

# Maritime Development

US Central Command (CENTCOM) reported on May 2 that US forces have directed 48 vessels to turn around or return to port since the start of the US blockade on Iranian ports.[19]

# US and Israeli Air Campaign

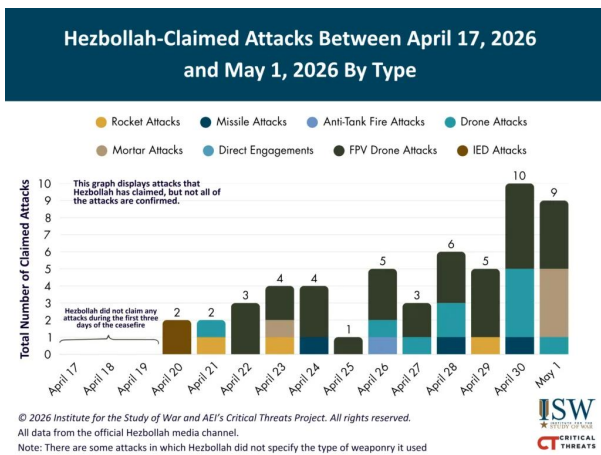
Nothing significant to report.

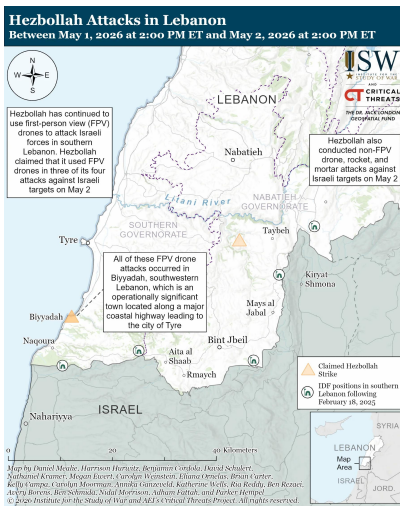
# Iranian Internal Dynamics

Nothing significant to report.

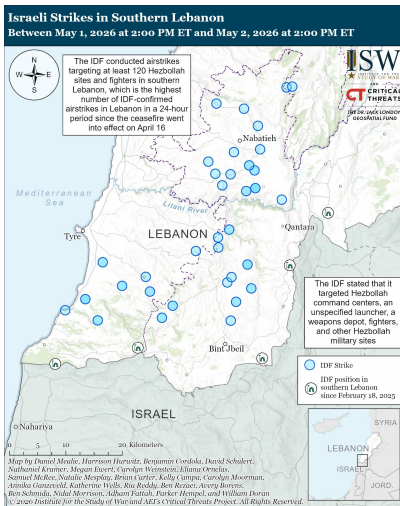
# Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah has continued to use first-person view (FPV) drones to attack Israeli forces in southern Lebanon.[20] Hezbollah claimed that it used FPV drones in three of its four attacks against Israeli targets on May 2.[21] All of these FPV drone attacks occurred in Biyyadah, southwestern Lebanon, which is an operationally significant town located along a major coastal highway leading to the city of Tyre.[22] Hezbollah has increasingly employed FPV drones in its attacks against Israeli targets since April 22 (see graphic below).[23] Hezbollah also conducted non-FPV drone, rocket, and mortar attacks against Israeli targets on May 2.[24]





**The IDF has continued to conduct a high rate of airstrikes targeting Hezbollah infrastructure and fighters in southern Lebanon.** The IDF has conducted airstrikes targeting at least 120 Hezbollah sites and fighters in southern Lebanon since CTP-ISW's last data cutoff on May 1.[25] This is the highest number of IDF-confirmed airstrikes in Lebanon in a 24-hour period since the ceasefire went into effect on April 16. The IDF stated that it targeted Hezbollah command centers, an unspecified launcher, a weapons depot, fighters, and other Hezbollah military sites.[26]



## Other Axis of Resistance Response

*Nothing significant to report.*



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