

Iran Update Special Report, May 3, 2026



Adham Fattah, Parker Hempel, Ria Reddy, Avery Borens, 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 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 counterproposal to the United States reportedly includes a three-phase plan that seeks to quickly end the war, guarantee no future combined force strikes on Iran, and address the Strait of Hormuz in the first phase, while delaying talks on Iran's nuclear program to a second phase.
2. Iran appears to be offering the possibility of discussing nuclear issues at a later date in order to push the United States to end the war and lift its naval blockade. Iran reportedly offered to discuss various options for pausing uranium enrichment, transferring or diluting its highly enriched uranium (HEU) stockpile, and other nuclear-related issues in the second phase of its proposal. Iran does not appear to have made any firm commitments to make concessions regarding its nuclear program in its latest proposal, however.
3. The United States has reportedly responded to Iran's counterproposal, according to Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei. US President Donald Trump previously stated on May 1 that he was "not satisfied" with the Iranian proposal.

Toplines

Iran's counterproposal to the United States reportedly includes a three-phase plan that seeks to quickly end the war, guarantee no future combined force strikes on Iran, and address the Strait of Hormuz in the first phase, while delaying talks on Iran's nuclear program to a second phase. US President Donald Trump expressed doubt on May 2 that the proposal "would be acceptable."[1] Al Jazeera, citing unspecified sources, reported on May 3 that Iran's counterproposal to the United States comprises three phases.[2] The first phase includes a "complete

end to the war” within 30 days, a mutual “guarantee of non-aggression” between the United States, Israel, Iran, and the Axis of Resistance, an end to the US blockade on Iranian ports in exchange for the “reopening” of the Strait of Hormuz, compensation for Iran “in a new and innovative format,” and the complete withdrawal of US forces from Iran’s “maritime perimeter.”[3] It is unclear whether the compensation clause refers to Iran’s demand for war reparations or Iran’s proposal to establish a toll scheme in the Strait of Hormuz. Iran included a plan to charge vessels that transit through the strait a fee in its previous proposal on April 26.[4] 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, likely referring to the toll scheme.[5] An Iranian media outlet affiliated with former Supreme National Security Council Secretary Ali Shamkhani similarly reported on May 2 that Iran’s counterproposal includes “a new mechanism” for the Strait of Hormuz.[6] Islamic Revolutionary Guards Corps (IRGC)-affiliated media separately reported on May 2 that the Iranian Parliament plans to approve a 12-point plan that would place restrictions on which ships are allowed to traverse the Strait of Hormuz.[7] Ships belonging to “hostile countries” would be required to pay war reparations to Iran in order to pass through the strait under this plan.[8]

The second phase of Iran’s proposal reportedly includes negotiations between the United States and Iran about Iran’s nuclear program.[9] Iran appears to be offering the possibility of discussing nuclear issues at a later date in order to push the United States to end the war and lift its blockade on Iranian ports. Iran does not appear to have made any firm commitments to make concessions regarding its nuclear program in its latest proposal, however. Axios reported on May 2 that Iran would agree to conduct a month of nuclear negotiations if the United States and Iran reached an agreement regarding the Strait of Hormuz and an end to the war in the next month, citing two sources briefed on the proposal.[10] Al Jazeera reported that Iran offered to “discuss the idea” of pausing uranium enrichment for “up to 15 years,” which is longer than previous Iranian proposals to pause enrichment for up to five years.[11] The Iranian proposal also posits that Iran could enrich up to 3.6 percent after the pause ends.[12] The 2015 Joint Comprehensive Plan of Action previously allowed Iran to enrich up to 3.67 percent.[13] President Trump has previously indicated that he would not accept a pause in enrichment and instead seeks for Iran to permanently suspend enrichment.[14] The proposal also states that Iran would be willing to “discuss the fate of” Iran’s highly enriched uranium (HEU) stockpile, with possible options including transferring the stockpile abroad or diluting it.[15] The United States has demanded that Iran hand over its HEU stockpile.[16] The proposal also insists that Iran will not dismantle any of its nuclear facilities.[17] The proposal emphasizes the need for sanctions relief for Iran in exchange for Iran’s nuclear “concessions.”[18] The *Wall Street Journal* similarly reported on May 1 that Iran’s proposal “calls for discussing the issues around Iran’s nuclear file in exchange for US sanctions relief.”[19] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei insisted on May 3 that Iran’s 14-point counterproposal is exclusively focused on ending the war and does not address nuclear issues.[20]

Baghaei announced on May 3 that the United States has responded to Iran’s counterproposal and that the Iranian regime is reviewing the United States’ response.[21] President Trump previously stated on May 1 that he was “not satisfied” with the Iranian counterproposal.[22]

Maritime Development

The IRGC Navy likely attacked a vessel in the Strait of Hormuz on May 3, likely to sustain high shipping costs and oil prices to pressure the United States to make concessions.[23] United Kingdom Maritime Trade Operations (UKMTO) reported that multiple small craft attacked a vessel—likely the Liberian-flagged, Greek-owned *Minoan Falcon*—11 nautical miles west of Sirik, Hormozgan Province,

Iran.[24] The vessel sailed northbound through the Strait of Hormuz before it abruptly turned south, likely due to the attack.[25] UKMTO confirmed that the vessel’s crew members are safe.[26] The IRGC Navy previously attacked and likely redirected two Greek-owned vessels toward Iran on April 22.[27] CTP-ISW assessed on May 2 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.[28]



US and Israeli Air Campaign

Nothing significant to report.

Iranian Response

Nothing significant to report.

Iranian Internal Dynamics

Nothing significant to report.

Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah has continued to claim attacks, including first-person view (FPV) drone attacks, against Israeli forces in southern Lebanon. Hezbollah has claimed 11 attacks using FPV and non-FPV drones, rockets, and mortars targeting Israeli forces operating in southern Lebanon since CTP-ISW’s last data cutoff on May 2.[29] This is the highest number of attacks that Hezbollah has claimed in a 24-hour period since the ceasefire went into effect on April 16. Hezbollah has continued to target Israel Defense Forces (IDF) forces operating in Biyyadah, southwestern Lebanon.[30] Hezbollah used FPV drones in two out of its five claimed attacks targeting IDF forces in Biyyadah.[31] Biyyadah is an operationally significant town located along a major coastal highway leading to the city of Tyre.[32] Hezbollah has frequently used FPV drones to target small groups and individual Israeli soldiers since April 22 (see graphic below). FPV drones are difficult to intercept and can strike targets with high precision.[33] The IDF also confirmed on May 3 that it identified and intercepted Hezbollah rockets and drones targeting IDF

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[37] <https://www.reuters.com/world/asia-pacific/hezbollah-pays-steep-price-battle-reverse-its-fortunes-2026-05-03/>

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Key Takeaways

1. Iran is attempting to demonstrate its “control” over the Strait of Hormuz in response to US attempts to secure freedom of commercial navigation in the strait. Iran is attempting to disrupt these US efforts and demonstrate its control by attacking commercial vessels, oil infrastructure in the United Arab Emirates (UAE), and a civilian building in Oman.
2. It is against the United States’ interests to allow Iran to exert control over the Strait of Hormuz and thus a large part of international maritime commerce. Allowing Iran to exert control over the strait enables Iran to impose economic costs on the United States and the international economy while simultaneously giving it leverage in negotiations over other important issues, such as Iran’s nuclear program.
3. US President Trump indicated on May 4 that the most recent Iranian attacks did not constitute a ceasefire violation, however. Trump stated that there was no “heavy firing” when asked whether Iran’s actions violated the ceasefire.

Toplines

Iran is attempting to demonstrate its “control” over the Strait of Hormuz in response to US attempts to secure freedom of commercial navigation in the strait. Iran is attempting to disrupt these US efforts and demonstrate its control by attacking commercial vessels, oil infrastructure in the United Arab Emirates (UAE), and a civilian building in Oman. Iranian decisionmakers seek to retain “control” over the strait because this “control” is a key piece of leverage over the United States. “Control” of the strait allows Iran to place upward pressure on the global price of

oil, which imposes economic and political costs on the United States, the longer the conflict goes on. US President Donald Trump said on May 3 that the US Navy would escort commercial vessels through the strait beginning on May 4. Successful transits under escort would undermine Iran's ability to credibly threaten commercial shipping. Iran's ability to "control" the strait is dependent on its ability to credibly threaten commercial shipping to compel shipping to pay Iran and use Iranian-dictated travel separation schemes.

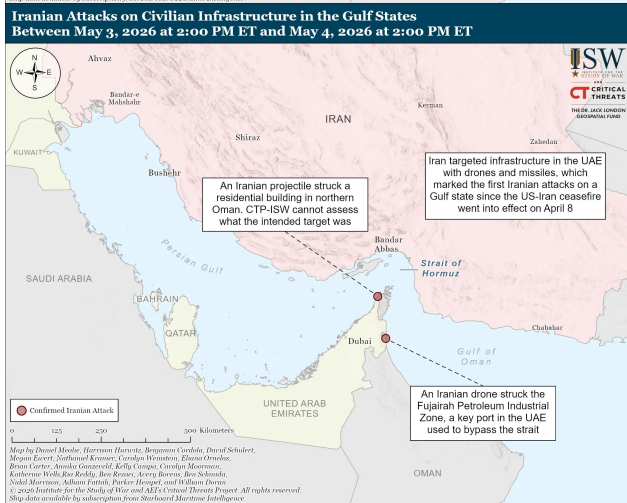
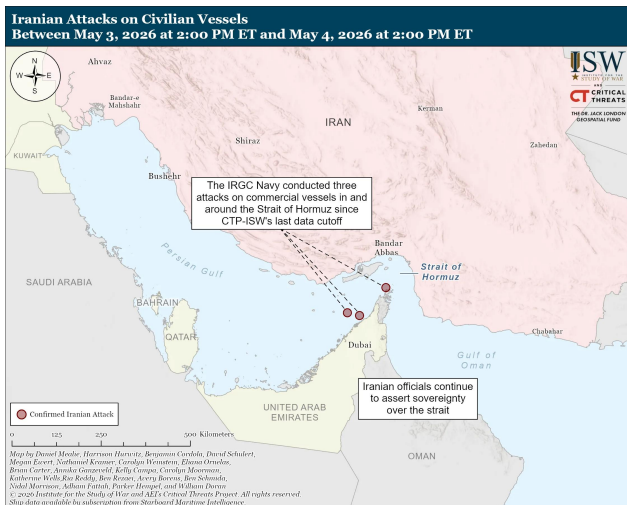
Hardline Iranian officials immediately recognized the risk that successful escorts would undermine their ability to threaten shipping and compel shipping to cooperate, and responded rhetorically and militarily. The Iranian Parliament's National Security and Foreign Policy Commission Chairman, Ebrahim Azizi, stated on May 3 that Iran would consider any US interference with Iran's blockade of the Strait of Hormuz to be a ceasefire violation.[1] Iranian forces then attacked an Emirati-affiliated tanker on May 3 with two drones as it tried to pass through the strait.[2] Khatam ol Anbia Central Headquarters Commander Brigadier General Ali Abdollahi Aliabadi threatened on May 4 to attack US warships and commercial vessels that try to transit through the Strait of Hormuz without Iranian permission.[3] The IRGC Navy also published a map of the Strait of Hormuz that claimed that Iran controlled all of the strait.[4] IRGC-affiliated media reported afterwards on May 4 that the IRGC Navy fired "a warning shot" at a US warship.[5] US Central Command (CENTCOM) announced on May 4 that two US destroyers guided two US-flagged commercial vessels through the strait without damage.[6] Iran reportedly fired cruise missiles and drones at the vessels and destroyers.[7] Iran also reportedly sent six fast attack craft after the commercial vessels, all of which US forces sank.[8]

Iran then escalated its attacks by targeting naval and land targets in the UAE and Oman on May 4, possibly to try to deter US allies from using the Strait of Hormuz after these initial steps failed to compel the United States to stop its efforts to escort shipping. The Emirati Defense Ministry announced on May 4 that its forces intercepted three of four Iranian cruise missiles fired at the UAE, with one falling in the sea.[9] Iran reportedly launched a drone at an unspecified target at the Fujairah Petroleum Industrial Zone in Fujairah, UAE, which injured three people.[10] The IRGC then reportedly struck a South Korean cargo vessel named *HMM Namu*, about 36 nautical miles north of Dubai, UAE.[11] The IRGC also reportedly struck an unknown vessel about 14 nautical miles west of Mina Saqr, UAE.[12] The Emirati Defense Ministry announced afterwards that its air defenses engaged Iranian projectiles at least three more times.[13] An Iranian projectile also struck a residential building in the Tabat area of Bukha Province, Musandam Governorate, Oman, but it is unclear if Iran sought to target this building.[14]

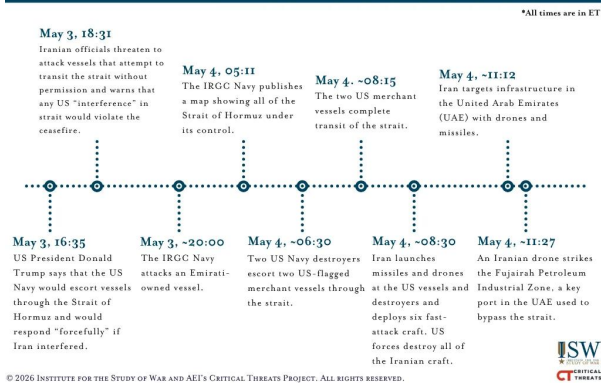
US President Trump indicated on May 4 that the most recent Iranian attacks did not constitute a ceasefire violation, however. Trump stated that there was no "heavy firing" when asked whether Iran's actions violated the ceasefire.[15]

It is against the United States' interests to allow Iran to exert control over the Strait of Hormuz and thus a large part of international maritime commerce. Allowing Iran to exert control over the strait enables Iran to impose economic costs on the United States and the international economy while simultaneously giving it leverage in negotiations over other important issues, such as Iran's nuclear program. Iranian officials have previously stated that Iran will impose a new regime in the Strait of Hormuz that will have "economic benefits" for Iran. Iranian 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.[16] Iran has planned different versions of toll schemes that would allow Iran to charge vessels of its choosing to pass through the strait. Iran offered to "open" the strait in its proposal on April 26, but caveated that it would charge vessels a toll to transit through the strait, for example.[17] Iran could also exploit control over the strait to extract concessions from the United States in talks on issues like Iran's nuclear program. Iranian Armed Forces

General Staff-run Defa Press argued on May 2 that the US-Iran conflict is one of attrition, in which each side is trying to impose economic costs on the other in a bid to extract concessions.[18]



Iranian Escalation in the Conflict with the United States and Israel
As of May 4, 2026 at 2:00 PM ET



Maritime Development

US CENTCOM reported on May 4 that US forces have directed 50 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

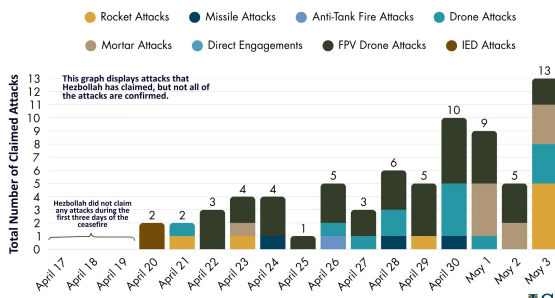
Nothing significant to report.

Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah has continued to claim attacks, including first-person view (FPV) drone attacks, against Israeli forces in southern Lebanon. Hezbollah claimed eight attacks targeting Israeli forces in southern Lebanon since ISW-CTP's last data cut off on May 3.[20] Hezbollah fighters wounded two 1st (Golani) Brigade (36th Division) soldiers in southern Lebanon as the soldiers attempted to cross the Litani River from Deir Seryan to Zawtar al Charqiyeh, both in southeastern Lebanon.[21] Hezbollah also claimed that it conducted an FPV drone attack targeting Israel Defense Forces (IDF) technical equipment in Biyyadah, southwestern Lebanon.[22] An Israeli military correspondent reported on May 4 that a Hezbollah drone lightly wounded an IDF soldier in southern Lebanon.[23] Hezbollah Secretary General Naim Qassem said on May 4 that Hezbollah fighters are currently choosing to conduct attacks designed to maximize Israeli casualties, rather than attempting to seize or hold territory.[24] The IDF estimates that Hezbollah has deployed around 100 drone operators who are operating in small squads operating throughout southern Lebanon, according to Israeli media on May 4.[25] The Hezbollah operators will reportedly typically launch a reconnaissance FPV drone to identify and select potential targets before launching FPV drones equipped with explosives to strike targets.[26] The IDF estimated that these Hezbollah drone operators use fiber-optic FPV drones, which are immune to jamming, in the majority of their attacks.[27]

The IDF is continuing to implement battlefield adaptations to address the threat of Hezbollah's FPV drones. Israeli media reported on May 3 that the IDF has begun to deploy drone interceptor systems in Lebanon.[28] These drone interceptor systems use radar to identify enemy drones and then launch an interceptor drone equipped with a net to neutralize the incoming drone.[29] IDF drone industry sources told Israeli media that the interceptor system could not effectively detect enemy drones in previous testing about a year ago, however.[30] Ukrainian Unmanned Systems Forces has increasingly and successfully intercepted Russian drones using interceptor drones in their war.[31] An Israeli correspondent reported on May 4 that the IDF has purchased hunting shotguns and is preparing to issue them to IDF units in Lebanon "soon." [32] Ukrainian and Russian units have also issued shotguns to anti-drone units as a drone countermeasure.[33] The IDF reportedly estimates that its new countermeasures will reduce Hezbollah FPV drone strikes on IDF forces by 80 percent.[34] ISW has observed in the war in Ukraine that the development of successful drone countermeasures requires a rapid innovation cycle, which involves countermeasure prototype testing by frontline units who can communicate with defense industry partners to adapt these prototypes to frontline conditions and then quickly redeploy these adapted countermeasures back to the frontline units.[35]

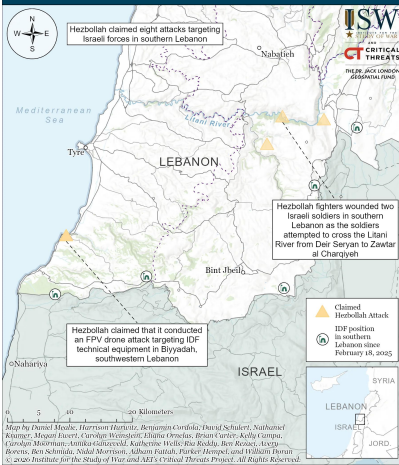
Hezbollah-Claimed Attacks Between April 17, 2026 and May 3, 2026 By Type



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Hezbollah Attacks in Lebanon Between May 3, 2026 at 2:00 PM ET and May 4, 2026 at 2:00 PM ET



Other Axis of Resistance Response

Nothing significant to report.

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Endnotes

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[2]

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Iran Update Special Report, May 5, 2026



Ben Rezaei, Adham Fattah, Carolyn Moorman, Avery Borens, Parker Hempel, William Doran, Katherine Wells, 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 has conducted a series of attacks against the United Arab Emirates (UAE) over the past 48 hours that are likely intended, in part, to isolate the UAE from other Gulf states. Iran's decision to solely attack the UAE, as opposed to multiple Gulf states, indicates that Iran is likely trying to isolate the UAE and exploit fractures between the Gulf states to sow further divisions between the UAE and other countries in the Gulf.
2. Iran's attacks against the UAE also likely seek to drive a wedge between the UAE and the United States and Israel in response to the UAE taking steps to strengthen its partnership with the United States and Israel. Iranian state-controlled media has suggested that Iran's attacks against the UAE were driven by the UAE's increasing alignment with the United States and Israel.
3. Iran's recent attacks against the UAE are also a response to US efforts to restore freedom of navigation through the Strait of Hormuz. Iran attacked an Emirati-linked vessel and UAE territory after US President Donald Trump announced Project Freedom on May 3.
4. Iran's escalation against the UAE also likely reflects internal Iranian regime dynamics and IRGC Commander Ahmad Vahidi's efforts to constrain diplomacy. Vahidi continues to dictate the regime's approach toward the Strait of Hormuz, which has reportedly angered Iranian "pragmatist" actors.
5. Iran is expanding its efforts to establish bureaucratic frameworks to assert its sovereignty over the Strait of Hormuz. The Iranian regime's English-language media outlet, Press TV, reported on May 5 that Iran has designed and implemented "a new mechanism for exercising sovereignty over the Strait of Hormuz."
6. US Secretary of Defense Pete Hegseth and US Chairman of the Joint Chiefs of Staff General Dan

Caine stated that Iranian attacks in the Strait of Hormuz and against the UAE on May 4 were not violations of the US-Iran ceasefire in a Pentagon press briefing on May 5. US officials have not commented on Iran's May 5 attack on the UAE at the time of this writing.

Toplines

Iran has conducted a series of attacks against the United Arab Emirates (UAE) over the past 48 hours that are likely intended, in part, to isolate the UAE from other Gulf states.[1] The UAE Defense Ministry reported on May 5 that Emirati air defense systems engaged Iranian missiles and drones.[2] ISW-CTP has not observed any reports of missile or drone impacts in the UAE at the time of this writing. Iran previously launched four waves of attacks against the UAE on May 4, including a drone attack against an unspecified target in the Fujairah Petroleum Industrial Zone.[3] Iran's decision to solely attack the UAE, as opposed to multiple Gulf states, indicates that Iran likely seeks to isolate the UAE and exploit fractures between the Gulf states to sow further divisions between the UAE and other countries in the Gulf. Iranian attacks on multiple Gulf countries would presumably unite these countries against Iran, in contrast.

Iran's attacks against the UAE also likely seek to drive a wedge between the UAE and the United States and Israel in response to the UAE taking steps to strengthen its partnership with the United States and Israel. Iranian state-controlled media has suggested that Iran's attacks against the UAE were driven by the UAE's increasing alignment with the United States and Israel.[4] An analyst close to the Iranian regime stated on May 4 that Iran targeted the UAE in response to the UAE's "unprecedented hostile approach" toward Iran, including UAE cooperation with the United States and Israel on security and military matters.[5] An Iranian media outlet affiliated with former Supreme National Security Council Secretary Ali Shamkhani separately cited Israel's reported provision of air defense systems to the UAE as further evidence of the UAE's alignment with the United States and Israel.[6] IRGC-affiliated media similarly claimed on May 4 that the UAE has become an Israeli "pawn." [7] Iran also likely seeks to send a message to other Gulf countries that they could become targets if they similarly increase cooperation with the United States and Israel.

Iran's recent attacks against the UAE are also a response to US efforts to restore freedom of navigation through the Strait of Hormuz. US President Donald Trump announced on May 3 the launch of Project Freedom to guide commercial vessels through the Strait of Hormuz and undermine Iranian efforts to "control" shipping through the strait.[8] Iran attacked an Emirati-linked vessel and UAE territory following the announcement, likely to demonstrate Iranian "control" over the strait and deter vessels from attempting to transit through the waterway.[9] The UAE has a direct interest in reopening maritime traffic through the strait. Iran's attacks on the UAE therefore likely seek to impose costs on a key US regional partner that benefits from Project Freedom and demonstrate that Iran can contest US efforts to reopen the strait.

Iran's escalation against the UAE also likely reflects internal Iranian regime dynamics and IRGC Commander Major General Ahmad Vahidi's efforts to constrain diplomacy. ISW-CTP previously assessed that Vahidi may seek to derail negotiations and may have accepted the risk of potential renewed conflict with the United States and Israel.[10] Vahidi and his inner circle have blocked "pragmatist" officials' efforts to push Iran toward a more flexible negotiating position.[11] Iran's recent attacks against the UAE and commercial vessels in the Strait of Hormuz highlight how Vahidi has prevailed in the regime's internal power struggle and marginalized "pragmatist" actors, particularly Parliament Speaker Mohammad Bagher Ghalibaf.[12]

Vahidi continues to dictate the regime's approach toward the Strait of Hormuz and Iran's broader conflict with the United States and Israel. Anti-regime media reported on May 5 that Iranian President Masoud Pezeshkian is “angry” with Vahidi’s decision to attack the UAE and called the attack an “irresponsible step” that was taken without Pezeshkian’s knowledge.[13] Pezeshkian is part of a group of pro-negotiations regime officials who view negotiations with the United States as preferable to renewed military conflict and better for the Iranian economy.[14] Pezeshkian reportedly sought an emergency meeting with Iranian Supreme Leader Mojtaba Khamenei to ask him to stop the IRGC’s attacks on the UAE and to prevent their reoccurrence.[15] Israeli media reported on April 19 that Vahidi is the only Iranian official with direct access to Mojtaba and is serving as a conduit for relaying key decisions to other regime officials, however.[16] Anti-regime media also reported on April 1 that Pezeshkian tried repeatedly to contact Mojtaba, but that a “military council” formed by Vahidi prevented Pezeshkian from contacting Mojtaba.[17]

Iranian officials have confirmed that Iran conducted the recent attacks against the UAE. The Khatam ol Anbia Central Headquarters spokesperson denied that Iranian armed forces conducted “any missile or drone operations” against the UAE and claimed that the UAE Defense Ministry’s recent announcements about Emirati air defenses intercepting Iranian missiles and drones are false.[18] Senior Iranian officials, including Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei, have acknowledged that Iran conducted the attacks, however.[19] The Khatam ol Anbia Central Headquarters spokesperson also warned that the UAE must not become a “den” for US and Israeli forces, which echoes threats from other Iranian officials that Iran can target states that host US forces or bases.[20] The spokesperson threatened a “crushing and regret-inducing response” if the UAE targets Iranian islands, ports, or coasts in response to Iran’s attacks.[21]

Iran is expanding its efforts to establish bureaucratic frameworks to assert its sovereignty over the Strait of Hormuz. The Iranian regime’s English-language media outlet, Press TV, reported on May 5 that Iran has designed and implemented “a new mechanism for exercising sovereignty over the Strait of Hormuz.”[22] The mechanism stipulates that ships that wish to transit through the strait will receive an email outlining “transit regulations” and that vessels must abide by these “regulations” to receive a “transit permit” to transit through the strait.[23] Iranian officials have previously stated that Iran will impose a “new management” in the Strait of Hormuz that will reap “economic benefits” for Iran.[24] Iran has proposed various toll schemes that would enable Iran to charge vessels of its choosing to pass through the strait.[25] This report comes amid other Iranian efforts to formalize Iranian “control” over the strait. Iranian media reported on April 19 that Iran’s parliament is drafting a bill that would ban Israeli-linked vessels from transiting the Strait of Hormuz, require vessels from “hostile countries” to obtain approval from Iran’s Supreme National Security Council to transit the strait, and bar states that have “caused damage” to Iran from transiting the strait until they pay reparations to Iran.[26]

Iranian officials have continued to emphasize the regime's intention to exert control over the Strait of Hormuz in the long term. ISW-CTP continues to assess that it is against the United States' interests to allow Iran to exert control over the Strait of Hormuz. Iranian Parliament Speaker Mohammad Bagher Ghalibaf stated on May 5 that “the new equation of the Strait of Hormuz is in the process of being solidified.”[27] IRGC Political Deputy Brigadier General Yadoleh Javani similarly stated that Iran’s “new management” of the Strait of Hormuz will be the “foundation of the global and international order.”[28] Allowing Iran to assert “sovereignty” over the strait would enable Iran to impose economic costs on the United States and the international economy while simultaneously giving it leverage in negotiations over other important issues, such as Iran’s nuclear program.[29] Iranian Armed Forces General Staff-run Defa Press argued on May 2 that the US-Iran conflict is one of attrition, in which each side is trying to impose economic costs on the other in a bid to extract concessions.[30]

US Secretary of Defense Pete Hegseth and US Chairman of the Joint Chiefs of Staff General Dan Caine stated that Iranian attacks in the Strait of Hormuz and against the UAE on May 4 were not violations of the US-Iran ceasefire in a Pentagon press briefing on May 5.[31]

Hegseth stated that “right now the ceasefire with Iran holds.”[32] Hegseth added that Project Freedom is “separate and distinct” from the ceasefire with Iran.[33] Caine stated that nine recent Iranian attacks on vessels and two Iranian vessel seizures in the Strait of Hormuz are “below the threshold of restarting major combat operations at this point.”[34] Caine acknowledged that Iran attacked Oman once and the UAE three times on May 4. US officials have not commented on Iran’s May 5 attack on the UAE at the time of this writing.[35]

Maritime Development

US Central Command (CENTCOM) reported on May 5 that US forces have directed 51 vessels to turn around or return to port since the start of the US blockade on Iranian ports.[36]

US and Israeli Air Campaign

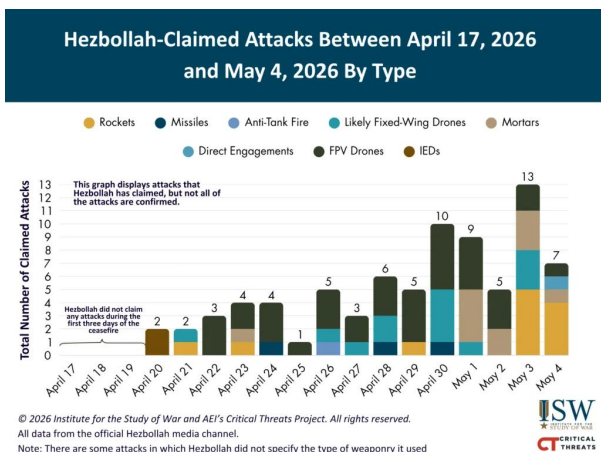
Nothing significant to report.

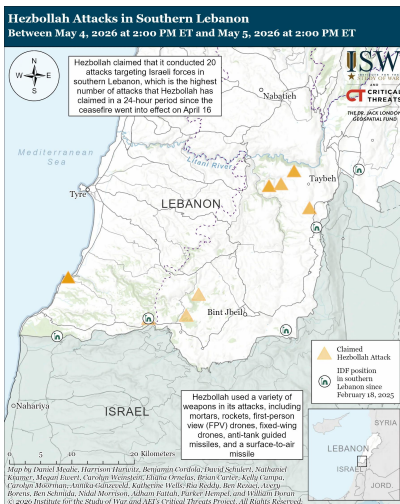
Iranian Response

See topline section.

Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah has continued to conduct attacks targeting Israeli forces in southern Lebanon since ISW-CTP’s last data cutoff on May 4. Hezbollah claimed that it conducted 20 attacks targeting Israeli forces in southern Lebanon between 2:00 PM ET on May 4 and 2:00 PM ET on May 5.[37] This is the highest number of attacks that Hezbollah has claimed in a 24-hour period since the ceasefire went into effect on April 16 (see below). Hezbollah used a variety of weapons in its attacks, including mortars, rockets, first-person view (FPV) drones, fixed-wing drones, and anti-tank guided missiles.[38] Hezbollah claimed six FPV drone attacks targeting Israeli forces in southern Lebanon on May 5.[39]





Other Axis of Resistance Response

Iran has reportedly pressured its Iraqi partners to end Iranian-backed Iraqi militias' kinetic operations, while strengthening Iranian-backed Iraqi political influence, likely to try to avoid US financial pressure against Iraq that negatively impacts Iran.[40] Unspecified informed sources told Iraqi media on May 5 that IRGC Quds Force Commander Brigadier General Esmail Ghaani warned about “real dangers” that could result in a loss of unspecified military privileges and discussed the need for an “alternative plan” regarding militia disarmament during meetings with unspecified militias and Shia Coordination Framework leaders in Baghdad on April 18.[41] The United States has pressured the Iraqi federal government since early 2025 to disarm Iraqi militias and dissolve the Iranian-backed Popular Mobilization Forces (PMF).[42] The PMF is an Iraqi state security institution that includes many Iraqi militias that answer to Iran instead of the Iraqi Prime Minister.[43] US pressure on the Iraqi federal government to reduce Iranian influence in Iraq has increased during the war due to attacks by the militias, including those within the PMF, against US and foreign targets in Iraq and the region.[44] US and Iraqi officials told the *Wall Street Journal* on April 22 that the US Treasury Department has temporarily halted shipments of Iraq’s oil export revenue via the US Federal Reserve due to concerns about militia behavior.[45] The officials said that the United States first blocked a shipment of oil export revenue to the Central Bank of Iraq when the war began in late February 2026 and recently blocked a cargo plane delivery of nearly \$500 million USD.[46] The Central Bank of Iraq has managed an account at the New York Federal Reserve on behalf of the Iraqi Finance Ministry since 2003 that holds the Iraqi federal government’s revenue from oil exports in US dollars.[47] Oil revenue accounts for about 90 percent of the Iraqi state’s budget.[48] Iran uses the Iraqi economy for sanctions evasion and to help fund the Axis of Resistance. The US Treasury Department’s actions therefore heavily impact Iran as the regime already faces immense economic pressure from the United States.[49]

Ghaani proposed a so-called “Grand Settlement” plan regarding militia disarmament, according to the informed sources speaking to Iraqi media.[50] Iraqi media reported that unspecified actors first proposed a similar version of this plan in early 2025.[51] The first part of Ghaani’s plan reportedly calls on multiple Iraqi militias, specifically Kataib Hezbollah, Harakat Hezbollah al Nujaba, and Kataib Sayyid al Shuhada, to end their kinetic activity in exchange for maintaining the PMF’s role within the Iraqi state.[52] These militias have, both historically and during the war, been the most kinetically active and are more subordinate to Iran than other militias.[53] Ghaani reportedly outlined a second phase that would seemingly only occur if the first phase failed to reduce tensions with the United States. The second phase would integrate the PMF into the Iraqi Security Forces (ISF).[54] The PMF currently operates separately from the ISF and reports, at least on paper, to the Iraqi Prime Minister instead of the Iraqi Defense Minister.[55] The informed sources implied that Iranian-backed Iraqi militia leaders would be offered

senior PMF positions in exchange for their suspension of kinetic operations.[56] Ghaani's plan reportedly seeks to avoid provoking the United States, while simultaneously consolidating Iranian influence in Iraq via the further infiltration of Iranian-backed Iraqi actors into Iraqi government, diplomatic, and security institutions.[57]

ISW-CTP continues to assess that Iran could decide to build a new, loyal cadre of ideological militias, over which Iran has strong control, that would supplement the political activity of Iranian-backed Iraqi actors. An Iranian-backed Iraqi militia source told UK-based Amwaj Media in November 2025 that Iran would consider funding and politically supporting smaller Iraqi militias that are not affiliated with the PMF, which would place these militias fully outside state structures and control.[58] Iran has previously established splinter groups or front groups to ensure militia loyalty to Iran or to obfuscate the involvement of larger militias in military activity against the United States.[59]

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Avery Borens, Katherine Wells, Ben Rezaei, Adham Fattah, Parker Hempel, William Doran, Carolyn Moorman

Analyst Notes: Data Cutoff: 2:00 PM ET

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Key Takeaways

1. Iran seeks to achieve positive strategic objectives beyond the negative objective of surviving the war. Iran's principal positive strategic objective at this time is to secure recognition of its sovereignty over the Strait of Hormuz, which would fundamentally remake regional and global maritime norms in a manner extremely detrimental to US interests.
2. Long-term control of the Strait would require Iran to secure US recognition of its claims to the Strait of Hormuz through a negotiated agreement so that Iran could order ships to comply with its rules legitimately and then intercept those ships that fail to comply. Iranian negotiators increasingly prioritized securing its control over the Strait in negotiations, likely because it believes Iranian control over the Strait would act as a safeguard against future wars between Iran and Israel and the United States.
3. Iran is also seeking economic relief as a positive objective from the war, which could enable Iran to accelerate its efforts to reconstitute its ballistic missile program. US sanctions on Iranian oil have contributed to severely weakening Iran's ability to raise revenue that the regime has used to fund the development of its ballistic missile program.
4. The introduction of these positive strategic objectives does not mean that Iran has abandoned its "negative" strategic objectives, which include limiting discussions on its nuclear program and avoiding an economic collapse that could trigger severe domestic unrest leading to the collapse of the regime.
5. The Iranian regime is preparing for economic instability that could cause domestic unrest. This effort supports the "negative" strategic objective of preventing regime collapse caused by protests that result from serious economic instability. Iranian officials' public emphasis on economic

management suggests that the regime recognizes that economic pressure could create internal stability risks and is preparing mechanisms to manage those risks. These statements, concerns, and preparations do not on their own indicate that the Iranian regime is prepared to surrender as a result of economic pressure.

Toplines

Iran seeks to achieve positive strategic objectives beyond the negative objective of surviving the war. Iran's principal positive strategic objective at this time is to secure recognition of its sovereignty over the Strait of Hormuz, which would fundamentally remake regional and global maritime norms in a manner extremely detrimental to US interests. Iran has denied access to the Strait of Hormuz during the war through mining, drone and missile attacks, and harassment by fast attack craft. Sea denial of the Strait of Hormuz can only be maintained through attacks, however. Long-term control of the Strait would require Iran to secure US recognition of its claims to the Strait of Hormuz through a negotiated agreement so that Iran could order ships to comply with its rules legitimately and then intercept those ships that fail to comply. Iranian negotiators increasingly prioritized securing its control over the Strait in negotiations, likely because it believes Iranian control over the Strait would act as a safeguard against future wars between Iran and Israel and the United States. The Strait under recognized Iranian control would act as a safeguard because Iran could close the Strait and disrupt markets at will, punish states in the Persian Gulf region for “collaborating” with Israel or the United States, and generate revenue through a system of tolls.[1] All of this and more would become legitimate with US recognition of Iranian claims to the Strait if the United States agreed to Iran's demands in negotiations. Recognition would also provide Iran with the legitimacy to intercept ships violating its rules. US, Israeli, or Gulf efforts to disrupt Iranian efforts to manage traffic to Tehran's benefit would be perceived as acts of aggression if the United States were to recognize Iranian claims to the Strait in negotiations.

Iran has already begun to take steps that demonstrate what these new norms could look like. Iran's “Persian Gulf Strait Authority” also sent an email on May 6 to shipping companies with vessels in the Persian Gulf stipulating that for safe passage through, crews must pay the body in Iranian rials and gain issuances of guarantees from Iranian banks, which would force everyone who wants to use the Strait to violate US sanctions.[2] These demands would be legitimate if Iran achieves its positive strategic aim of securing control over the Strait of Hormuz. The email makes it clear that countries whose ships want to go through the Strait have to lift sanctions.[3]

Iran is also seeking economic relief as a positive objective from the war, which could enable Iran to accelerate its efforts to reconstitute its ballistic missile program. US sanctions on Iranian oil have contributed to severely weakening Iran's ability to raise revenue that the regime has used to fund the development of its ballistic missile program.[4] Iran is also seeking for the United States to unfreeze nearly \$100 billion USD in Iranian assets, which could quickly provide the regime with the needed funds for investment into reconstituting its ballistic missile program on the strategic level.[5] These funds would be needed to rebuild missile production plants, development facilities, and plants for raw materials like steel, many of which were destroyed during the current war.[6] Iran has used its ballistic missiles to attack US bases and allies in the recent conflict and in previous conflicts like the 12 Day War.[7] CNN reported on May 6 that Israel is particularly worried about the possible lifting of economic sanctions on Iran and has pushed for restrictions to be imposed on Iran's ballistic missile program.[8] Economic relief would also support “negative” strategic objectives like preventing regime collapse caused by protests that result from serious economic instability (see below).

The introduction of these positive strategic objectives does not mean that Iran has abandoned its “negative” strategic objectives, which include limiting discussions on its nuclear program and avoiding an economic collapse that could trigger severe domestic unrest, leading to the collapse of the regime. Avoiding the collapse of one’s regime is an objective of all regimes. Iranian leaders also almost always insist on the legitimacy of at least some form of a nuclear program. These two objectives are constant and do not represent a comprehensive positive vision for the future of the region. Iran now possesses such a vision. The Iranian objectives, if accomplished in full, would result in an extremely strong Iran that would be able to compel most regional states to follow its lead through control of the Strait of Hormuz.

The Iranian regime is preparing for economic instability that could cause domestic unrest. This effort supports the “negative” strategic objective of preventing regime collapse caused by protests that result from serious economic instability. Iranian Parliament Speaker Mohammad Bagher Ghalibaf published an audio message on May 6, in which he framed the maritime blockade, economic pressure, and media operations as part of an “enemy effort” to undermine national cohesion and force Iran to surrender.[9] These remarks demonstrate that the Iranian regime is attempting to bolster itself against domestic instability that could result from economic pressure rather than preparing to surrender. Ghalibaf called on officials to reduce the effects of economic pressure on the public, urged wartime-style planning, and “jihadi management.”[10] Ghalibaf also called on the Basij to “enter the field seriously” and asked Basij members in mosques, neighborhoods, and social groups to help solve public problems.[11] The regime uses the Basij for civil defense, social control, and protest suppression.[12] Anti-regime media reported on April 27 that Iran’s Supreme National Security Council, which is the highest national security body, was reportedly preparing for a potential protest wave as economic deterioration and social pressure intensified.[13] Iranian officials are reportedly concerned about inflation, unemployment, rising prices, shutdowns in the oil, petrochemical, and steel sectors, and broader economic disruption.[14] Iranian officials’ public emphasis on economic management suggests that the regime recognizes that economic pressure could create internal stability risks and is preparing mechanisms to manage those risks. These statements, concerns, and preparations do not on their own indicate that the Iranian regime is prepared to surrender as a result of economic pressure.

ISW-CTP continues to assess that Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi is driving decisionmaking over Iran’s war and negotiating posture. Iranian officials may still disagree over how to proceed in negotiations, however, and some may present positions that do not necessarily reflect Vahidi’s approval. This may help to explain US officials’ assessment that Iranian decisionmaking remains fragmented, even though Vahidi likely drives decisionmaking due to his proximity to Supreme Leader Mojtaba Khamenei.[15]

It remains unclear what specific demands the US and Iranian delegations are currently negotiating over. A Pakistani source familiar with the negotiations told a *New York Post* journalist that there are multiple proposals circulating.[16] This makes it difficult to determine the precise terms currently being negotiated or even whether both sides are referring to the same framework. US officials leaked to Axios on May 6 that the White House believes it is close to a one-page memorandum of understanding with Iran that would declare an end to the war and open a 30-day window for negotiations on a more detailed deal, however.[17] The US sources noted that nothing has been finalized but described this as the closest the sides have come to an agreement since the conflict began.[18] The reported framework would include an Iranian moratorium on nuclear enrichment for 12-15 years, partial sanctions relief and the release of frozen Iranian funds, and a gradual lifting of restrictions in the Strait of Hormuz, with future steps contingent on the success of follow-on negotiations in venues such as Islamabad or Geneva.[19] It is unclear what is implied by “restrictions” or if any Iranian official has seen the same memorandum leaked by US officials to Axios.

Iranian officials and media have largely rejected the Axios reporting, insisting that Iran has not agreed to any deal and has not yet formally responded to the latest US proposal, which they say contains unacceptable provisions.[20] Several outlets framed the US media narrative as pressure tactics or market manipulation.[21] The outlets instead emphasized Iran's own previous proposals and stated red lines, including rejection of uranium removal from Iran.[22] US President Donald Trump publicly reinforced a tougher US position at odds with the memorandum leaked by Axios, telling PBS later on May 6, that any deal would require Iran to export its highly enriched uranium, cease operating underground facilities, and accept no future enrichment even at low levels after a moratorium period.[23]

Maritime Development

The US naval blockade and sanctions are imposing costs on Iran. US Central Command (CENTCOM) announced on May 6 that US naval forces have directed 52 vessels to turn around or return to ports since the blockade began on April 13.[24] CENTCOM separately stated that a US Navy F/A-18 Super Hornet disabled the rudder of the Iranian-flagged oil tanker M/T *Hasna* after it tried to violate the blockade in the Gulf of Oman.[25] The US blockade is also straining Iran's oil storage by restricting exports and forcing Iran to store unsold oil. An unspecified Iranian Oil Ministry official told the *New York Times* on May 6 that Iran has started cutting oil production at some oil wells to mitigate a storage shortage crisis.[26] The official estimated that Iran's onshore and offshore storage could run out in about 40 to 45 days.[27] The US blockade is creating operational and economic pressure for Iran, but the regime appears to be preparing to manage that pressure as a domestic-control problem rather than treating it as a reason to concede (see topline section).

US and Israeli Air Campaign

Nothing significant to report.

Iranian Internal Dynamics

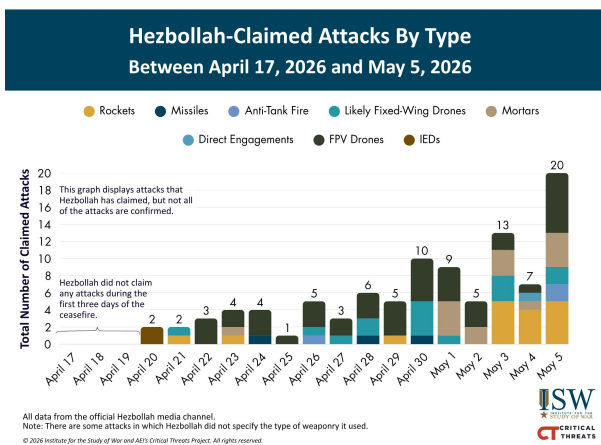
See the topline section.

Israeli Campaign Against Hezbollah and Hezbollah Response

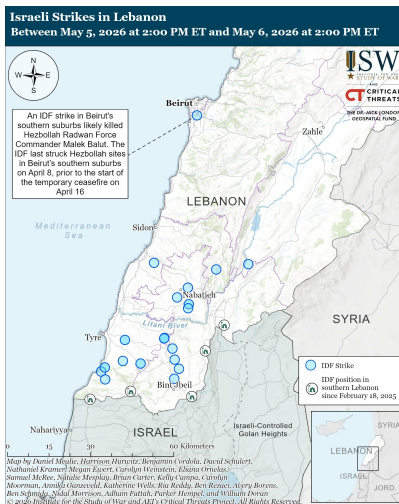
Hezbollah is likely attempting to disrupt Israeli operations by using harassing fire to limit the Israel Defense Forces (IDF)'s ability to consolidate positions within the new security zone and impose costs on the IDF. A force employing harassing fire seeks to curtail movement or lower morale.[28] Hezbollah has conducted small-scale attacks against Israeli forces in southern Lebanon, using mortars, rockets, likely fixed-wing drones, first-person view (FPV) drones, and anti-tank guided missiles (ATGM), since the ceasefire went into effect on April 16.[29] Hezbollah fighters are conducting these attacks at random times throughout the day and from non-fixed positions, which suggests that Hezbollah aims to prevent Israeli forces from adjusting to any predictable routine, impose psychological costs, and degrade operational tempo.[30] Hezbollah has also increasingly used FPV drones, which contribute to this effect because they are relatively difficult to detect and counter, unlike rockets or mortars.[31] An Israeli reservist currently operating in Lebanon told the *Wall Street Journal* on April 30 that Hezbollah has been constantly flying FPVs toward Israeli forces at an average of at least 10 alerts a

day.[32] This report suggests that Hezbollah fighters are flying FPV drones over Israeli forces to create a sense of unpredictability.

Hezbollah is reinforcing these FPV attacks with suggestions to the media that Hezbollah will employ suicide bombers.[33] These media reports can also impose psychological costs by increasing fears of suicide bombers, which are relatively difficult to detect and incredibly psychologically disorienting because the introduction of suicide bombers causes soldiers to perceive anyone on the battlefield as a possible threat. A Hezbollah official also told Lebanese media on May 6 that Hezbollah is considering conducting suicide operations in southern Lebanon, which the group used frequently in the 1980s and 1990s.[34] A retired Lebanese general told Lebanese media that such operations impose psychological effects by increasing Israeli forces' anxiety "even without acting on it." [35] FPV drone attacks and suicide operations create constant risks of attack and generate anxiety, which can weaken force morale and place soldiers under immense psychological stress.[36] Hezbollah's recent FPV drone attacks have killed and wounded several Israeli soldiers.[37] Hezbollah Secretary General Naim Qassem confirmed on May 4 that Hezbollah fighters are currently choosing to conduct attacks designed to maximize Israeli casualties.[38] Hezbollah likely hopes to keep casualty rates at a level that would impose political pressure that causes the IDF to relent and end operations, but would not warrant a resumption in fighting.

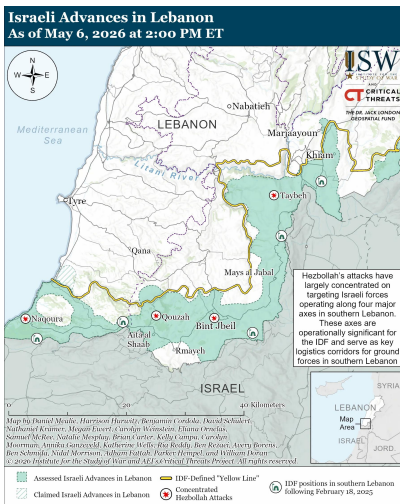


Hezbollah has also stated that its attacks aim to prevent Israel from achieving its objectives and establishing a "foothold in Lebanon," which refers to the expansion and solidification of Israel's security zone.[39] Hezbollah's attacks have largely concentrated on targeting Israeli forces operating along four major axes in southern Lebanon: the Taybeh-Qantara axis in southeastern Lebanon, the Naqoura axis in southwestern Lebanon, the Qouzah axis in central southern Lebanon, and the Bint Jbeil axis in southeastern Lebanon.[40] These axes are operationally significant for the IDF and serve as key logistics corridors for ground forces in southern Lebanon, which are crucial for Israeli forces' freedom of movement.[41] Israeli Defense Minister Israel Katz previously stated that Israeli forces will hold positions in southern Lebanon up to the Litani River.[42] Solidified IDF positions along these four axes would be crucial to enable the IDF's ability to advance its ground forces towards the Litani River, which is approximately 10 to 15 kilometers deeper inside Lebanese territory than where IDF forces are currently.[43]



Hezbollah is not yet conducting these operations at a scale that is changing Israeli decisionmaking, however. The IDF has faced some domestic criticism and pressure due to recent casualties from Hezbollah's attacks, specifically its FPV drone attacks.[44] Senior Israeli military officials have acknowledged that the IDF entered the war in Lebanon without sufficient tools to counter the threat of FPV drones.[45] Hezbollah's attacks have not altered Israeli decision-making or caused the IDF to rethink its operations in Lebanon. IDF Chief of Staff Lieutenant General Eyal Zamir recently instructed the IDF to target Hezbollah's FPV drone production and supply chain infrastructure "beyond southern Lebanon." [46] The Israeli Air Force (IAF) has similarly called for the IDF to expand its operations in southern Lebanon to combat these threats.[47] Zamir reaffirmed on May 6 that the IDF is determined to continue its operations against Hezbollah.[48]

The IDF conducted a strike targeting Hezbollah's Radwan Force commander in Beirut's southern suburbs on May 6.[49] This marks the first Israeli strike in Beirut since the start of the temporary ceasefire.[50] Israeli Prime Minister Benjamin Netanyahu and Defense Minister Israel Katz released a joint statement announcing that the IDF conducted an airstrike on May 6, targeting Hezbollah Radwan Force commander Malek Balut in Beirut.[51] A source close to Hezbollah told AFP that the Israeli strike killed Balut.[52] It is unclear whether other Hezbollah officials, including the Radwan Force deputy commander, were also present at the time of the attack.[53] A source told Israeli media on May 6 that Israel informed the United States before conducting the strike.[54] Netanyahu and Katz said that Hezbollah's Radwan Force, under Balut's command, has fired projectiles at Israeli communities and harmed Israeli soldiers.[55] The Radwan Force is Hezbollah's elite special operations unit that Hezbollah, with Iranian support, built to conduct major ground attacks into Israel.[56] An Israeli Army Radio correspondent reported that Balut served as Hezbollah's Radwan Force Commander since the IDF killed the previous Radwan Force commander, Wassim Tawil, in January 2024.[57] The IDF last struck Hezbollah sites in Beirut's southern suburbs on April 8, prior to the start of the temporary ceasefire on April 16.[58]



Other Axis of Resistance Response

Iranian-backed Iraqi militia Harakat Hezbollah al Nujaba head Akram al Kaabi rejected militia disarmament on May 6 and called the group's weapons a "red line."[59] Harakat Hezbollah al Nujaba has been one of the most kinetically active Iraqi militias during both the current conflict and the October 7 War, often conducting attacks as part of the Islamic Resistance in Iraq.[60] Militia attacks during the war have caused the United States to increase pressure on the Iraqi government to disarm Iranian-backed militias and dissolve the Iranian-backed Popular Mobilization Forces (PMF).[61] The PMF is an Iraqi state security institution that includes many militias, such as Harakat Hezbollah al Nujaba, that answer to Iran instead of the Iraqi government.[62] The US Department of State issued a \$10 million reward for information on Kaabi on May 5.[63] Kaabi's statement follows Iraqi media reporting on May 5 that IRGC Quds Force Commander Brigadier General Esmail Ghaani has pressured unspecified Iranian-backed Iraqi actors to end the kinetic operations of Iraqi militias, including Harakat Hezbollah al Nujaba, and expand their political activities.[64] Ghaani's plan for Iraqi militias to scale down kinetic operations in exchange for deepening their political influence intends to avoid inciting US financial pressure on Iraq that would harm the Iranian regime, while consolidating Iranian influence in the Iraqi government.[65]

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Iran Update Special Report, May 7, 2026



Ben Rezaei, Adham Fattah, Parker Hempel, William Doran, Benjamin Schmida, Katherine Wells, Avery Borens, Ria Reddy, Annika Ganzeveld

Analyst Notes: Data Cutoff: 6:00 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.

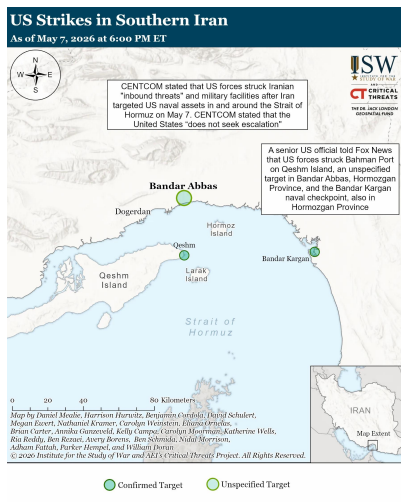
Key Takeaways

1. US Central Command (CENTCOM) announced on May 7 that US forces “eliminated inbound threats” and struck Iranian military facilities responsible for attacks on US forces after Iran targeted US naval assets in and around the Strait of Hormuz. CENTCOM stated that the United States “does not seek escalation.”
2. The United States and Iran remain divided over key issues, particularly issues related to Iran’s nuclear program and Iranian efforts to assert sovereignty over the Strait of Hormuz. Iran’s highly enriched uranium (HEU) stockpile and enrichment activities are some of the main obstacles to a deal.
3. Iran is increasingly attempting to formalize recognition of its sovereignty over the Strait of Hormuz in a way that would fundamentally remake regional and global maritime norms in a manner extremely detrimental to US interests.
4. Iranian regime media highlighted a meeting between Iranian Supreme Leader Mojtaba Khamenei and President Masoud Pezeshkian, likely to display unity amid reports of divisions within the regime. Pezeshkian reportedly sought an emergency meeting with Mojtaba to ask him to stop the IRGC’s attacks on the UAE and to prevent their reoccurrence. The fact that Iranian media and Mojtaba’s office have not provided details about what Mojtaba and Pezeshkian discussed suggests that Pezeshkian did not convince Mojtaba to alter the regime’s current policies.

Toplines

US Central Command (CENTCOM) announced on May 7 that US forces “eliminated inbound threats” and struck Iranian military facilities responsible for attacks on US forces after Iran targeted US naval assets in and around the Strait of Hormuz.[1] CENTCOM stated that the United States “does not seek escalation.” CENTCOM reported that Iranian forces launched multiple missiles, drones, and fast attack craft at US naval assets, including the USS Truxtun, USS Rafael Peralta, and USS Mason, while the vessels were transiting the strait. CENTCOM confirmed that the munitions did not hit any US assets. US forces subsequently struck Iranian military targets responsible for the attacks, including missile and drone launch sites, command-and-control centers, and intelligence, surveillance, and reconnaissance sites. A senior US official told Fox News that US forces struck Bahman Port on Qeshm Island, an unspecified target in Bandar Abbas, Hormozgan Province, and the Bandar Kargan naval checkpoint, also in Hormozgan Province.[2] The official added that the strikes do not indicate a resumption of the war.[3]

Iranian media claimed that Iran fired missiles at US warships south of Chabahar Port after US forces targeted two Iranian vessels near Jask, Hormozgan Province, and Fujairah Port in the United Arab Emirates (UAE).[4] Khatam ol Anbia Central Headquarters Spokesperson Ebrahim Zolfaghari warned Emirati civilians to “stay away from oil and military centers” following the attacks.[5] The recent strikes follow a series of Iranian attacks against the UAE on May 4 and 5, including a strike on the Fujairah Petroleum Industrial Zone, a key port that the UAE uses to bypass the strait.[6] ISW-CTP will continue to monitor this situation and provide further analysis in its May 8 morning thread on X.



The United States and Iran remain divided over key issues, particularly issues related to Iran’s nuclear program and Iranian efforts to assert sovereignty over the Strait of Hormuz. The *Wall Street Journal*, citing senior US officials, reported on May 6 that the US Government has seven main demands.[7] These demands include the dismantlement of Fordow, the Esfahan Nuclear Technology Center, and Natanz, a ban on underground nuclear activities, on-demand inspections, a 20-year moratorium on enrichment, an Iranian commitment not to seek a nuclear weapon, the removal of all enriched nuclear material from Iran, and the reopening of the Strait of Hormuz.[8] Iranian officials continue to reject many of these demands, however.[9] Parliamentary National Security and Foreign Policy Commission Vice Chairman Behnam Saeeedi stated on May 7 that Iran’s red lines include enrichment, the Strait of Hormuz, complete sanctions relief, and the release of frozen Iranian assets.[10] Saeeedi added that negotiations will fail if the United States does not accept Iran’s “right” to enrichment.[11] Unspecified individuals familiar with the matter told the *Wall Street Journal* on May 6 that key issues, including the length of any enrichment moratorium, the possible removal of Iran’s HEU

from Iran, and Iran's assertion of sovereignty over the Strait of Hormuz, "remain unresolved and are expected to complicate any talks." [12]

Iran's highly enriched uranium (HEU) stockpile and enrichment activities continue to be some of the main obstacles to a deal. Israeli media reported on May 6 that US President Donald Trump insists on the removal of Iran's HEU stockpile from Iran and will not sign an agreement that does not address that demand. [13] Armed Forces General Staff (AFGS)-run Defa Press rejected on May 7 both diluting and handing over Iran's HEU, stating that diluting uranium is equivalent to handing over uranium to "the enemy." [14] Three Iranian officials similarly told the *New York Times* on May 7 that talks with the United States remain stalled over US demands that Iran commit in advance to hand over its HEU stockpile, close the Fordow, Natanz, and Esfahan nuclear facilities, and suspend enrichment for 20 years. [15] The officials stated that Iran has instead proposed diluting "some" of its HEU stockpile, transferring the remainder to a third country, possibly Russia, and suspending enrichment for 10 to 15 years. [16] Iranian officials also appear divided over how much the regime should concede on the nuclear file. [17] ISW-CTP previously assessed that Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi, who has not publicly indicated any willingness to concede on these nuclear issues, is currently the main decisionmaker in the regime. [18]

Iran is increasingly attempting to formalize recognition of its sovereignty over the Strait of Hormuz in a way that would fundamentally remake regional and global maritime norms in a manner extremely detrimental to US interests. Iran recently designed and implemented a new system under which vessels receive transit regulations and instructions by email and must comply with Iranian procedures to obtain authorization for passage through the strait. [19] CNN reviewed a "Vessel Information Declaration" form on May 7, which was issued by Iran's Persian Gulf Strait Authority, that requires vessels to provide extensive ownership, nationality, and crew information before being granted permission to transit through the strait. [20] Iranian parliamentarians stated that vessels cannot pass through the strait without accepting Iranian sovereignty over the strait and argued that the United States must submit to Iran's "new legal regime" in the waterway. [21] Supreme Leader Military Adviser Major General Mohsen Rezaei told Hezbollah-affiliated Al Mayadeen on May 6 that Iran has two main objectives in the Strait of Hormuz: "security" and trade. [22] Rezaei argued that Iran must control and manage the strait because the United States and Israel used the strait and the Persian Gulf to attack Iran during the war. [23] Iranian officials' statements indicate that Iran is trying to secure long-term recognition of its control over strait transit.

Iranian regime media highlighted a meeting between Iranian Supreme Leader Mojtaba Khamenei and President Masoud Pezeshkian, likely to display unity amid reports of divisions within the regime. Iranian state media reported on May 7 that Pezeshkian met with Mojtaba for nearly two and a half hours but did not provide details about what Mojtaba and Pezeshkian discussed. [24] Pezeshkian stated after the meeting that Mojtaba's "behavior can naturally be a model for the country's management and administrative system." [25] This meeting comes after anti-regime media reported on May 5 that Pezeshkian was "angry" with IRGC Commander Major General Ahmad Vahidi's decision to attack the United Arab Emirates (UAE). [26] Pezeshkian reportedly sought an emergency meeting with Mojtaba to ask him to stop the IRGC's attacks on the UAE and to prevent their reoccurrence. [27] The fact that Iranian media and Mojtaba's office have not provided details about what Mojtaba and Pezeshkian discussed suggests that Pezeshkian did not convince Mojtaba to alter the regime's current policies. ISW-CTP continues to assess that Vahidi is the regime's primary decisionmaker. Israeli media reported on April 19 that Vahidi is the only Iranian official with direct access to Mojtaba and is serving as a conduit for relaying key decisions to other regime officials. [28] Anti-regime media previously reported on April 1 that Pezeshkian had repeatedly tried to contact Mojtaba, but that a "military council" formed by Vahidi had prevented Pezeshkian from contacting Mojtaba. [29]

Maritime Development

See topline section.

US and Israeli Air Campaign

The Institute for Science and International Security reported on May 6 that Iran has taken steps to limit access to the Mount Kolang Gaz La facility, which is located south of the Natanz Enrichment Complex in Esfahan Province.^[30] The Institute, citing commercially available satellite imagery, reported that Iran has partially closed two of the facility's tunnel entrances with earthen material as of April 22. The Institute noted that the tunnel entrances were unobstructed in early April.^[31] The Institute added that the tunnel entrances at the Kolang Gaz La facility are not completely obstructed like the tunnel entrances at Fordow or the Esfahan Nuclear Technology Center but would hinder vehicles from entering or exiting the facility and require heavy equipment to restore access.^[32] The Institute reported that the US-Israeli combined force previously struck a vehicle at the site on March 6.^[33] The Institute previously reported in 2024 that the Kolang Gaz La facility was slated to host an advanced centrifuge assembly site.^[34]

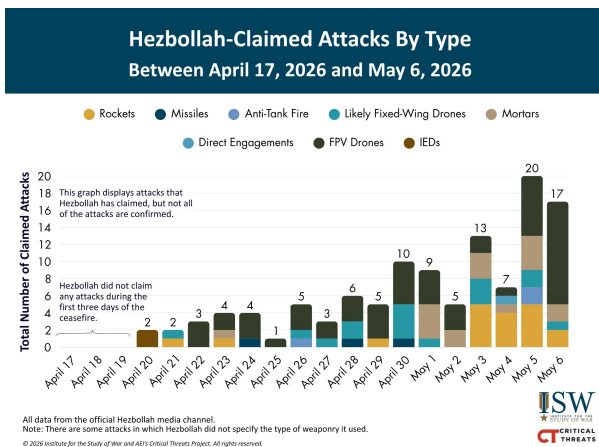
Iranian Response

See topline section.

Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah and the Israel Defense Forces (IDF) have continued to conduct attacks against each other. Hezbollah has conducted 12 small-scale attacks, including six first-person view (FPV) drone attacks, against Israeli forces in southern Lebanon since ISW-CTP's last data cutoff on May 6.^[35] These attacks are a continuation of Hezbollah's likely attempt to disrupt Israeli operations by using harassing fire, which is fire that is intended to disrupt enemy troop and vehicle movement, disturb their rest, and lower their morale.^[36] The IDF and an Israeli Army Radio correspondent recently reported that Hezbollah's drone attacks have caused 41 IDF casualties, including three deaths, since the start of the ceasefire on April 16.^[37] Hezbollah Secretary General Naim Qassem confirmed on May 4 that Hezbollah fighters are currently conducting attacks designed to maximize Israeli casualties.^[38] Hezbollah likely seeks to keep casualty rates at a level that would impose political pressure that causes the IDF to relent and end operations but would not warrant a resumption in fighting. The IDF continued to conduct airstrikes targeting Hezbollah infrastructure and weapons, including drone infrastructure, across southern Lebanon on May 6 and 7.^[39] The IDF struck 20 Hezbollah targets, including a drone launch site, other drone infrastructure, and weapons manufacturing sites, in Nabatieh District, southeastern Lebanon, on May 7.^[40] The IDF has continued to develop and deploy FPV drone countermeasures for IDF units operating in southern Lebanon, including issuing anti-drone nets, mobile radar systems, and shotguns to Israeli soldiers.^[41] ISW has observed in the war in Ukraine that the development of successful drone countermeasures requires a rapid innovation cycle, which involves countermeasure prototype testing by frontline units who can communicate with defense industry partners to adapt these prototypes to frontline conditions and then quickly redeploy these adapted countermeasures back to the frontline units.^[42] The IDF also confirmed on May 7 that it has killed over 85 Hezbollah fighters and struck over 180 Hezbollah sites in Lebanon over the past week.^[43] These strikes are part of the IDF's effort to

remove any immediate threat to Israeli forces and degrade Hezbollah's ability to launch attacks against Israeli forces.[44]



Other Axis of Resistance Response

Iranian-backed Badr Organization head Hadi al Ameri has reportedly formed a committee with Iraqi Prime Minister-designate Ali al Zaidi and caretaker Prime Minister Mohammad Shia al Sudani to develop a plan to disarm Iranian-backed Iraqi militias.[45] US-funded Arabic media reported on May 5 that the Shia Coordination Framework, which is a loose coalition of Shia political parties, compelled the three officials to convene and develop an “implementable” plan to restrict arms to the Iraqi government.[46] Ameri met with Zaidi on May 7 to discuss government formation and the need for unity among “national political forces.”[47] An unnamed Shia Coordination Framework source claimed that several Iranian-backed Iraqi militias, including Asaib Ahl al Haq and the Imam Ali Brigades, have expressed support for the disarmament initiative if it incorporates the militias’ unspecified conditions for disarmament.[48] An unnamed Iraqi National Security Council official stated that Iranian-backed Iraqi militias Kataib Hezbollah and Harakat Hezbollah al Nujaba have rejected disarmament.[49] Harakat Hezbollah al Nujaba leader Akram al Kaabi rejected militia disarmament on May 6 and called the group’s weapons a “red line.”[50]

The Shia Coordination Framework’s disarmament initiative intends to relieve US pressure on the Iraqi government amid US demands to disarm Iraqi militias.[51] An unnamed Shia Coordination Framework source said that the committee’s militia disarmament plan is intended to be “presentable” to the United States and “reassure” US officials.[52] These reports come after Iraqi media reporting on May 5 that IRGC Quds Force Commander Brigadier General Esmail Ghaani has directed unspecified Iranian-backed Iraqi actors to end the kinetic operations of Iraqi militias.[53] Ghaani has reportedly called on several Iraqi militias to end their kinetic activity in exchange for positions within the Iraqi state.[54]

The US Treasury Department sanctioned Iraq’s deputy oil minister on May 7 for helping Iran evade sanctions by blending Iranian oil with Iraqi crude. These sanctions are part of the United States’ effort to put pressure on the Iranian economy and Iranian-backed Iraqi militias.[55] The Treasury Department’s Office of Foreign Assets Control (OFAC) stated on May 7 that Iraqi Deputy Oil Minister Ali Maarij al Bahadly facilitated the smuggling of several million dollars’ worth of Iraqi oil per day to a prominent Iranian-linked Iraqi oil smuggler, Salim Ahmed Said, who combined the Iraqi oil with Iranian crude.[56] OFAC added that Maarij falsified documents, enabling the blended oil to be sold as Iraqi oil. Maarij also diverted Iraqi oil to Iranian-backed Iraqi militia Asaib Ahl al Haq.[57]

Treasury Secretary Scott Bessent said that the United States “will not stand idly by as Iran’s military exploits Iraqi oil to fund terrorism against the United States and our partners.”[58] OFAC previously sanctioned Said in 2025 for smuggling Iranian oil disguised as Iraqi oil, which was then sold to Western buyers via Iraq or the UAE as Iraqi oil.[59] OFAC also sanctioned three senior Iranian-backed Iraqi militia leaders, including leaders from Kataib Sayyid al Shuhada and Asaib Ahl al Haq, in addition to Maarij, on May 7.[60] These sanctions follow the Treasury Department’s decision on April 22 to temporarily halt shipments of Iraq’s oil export revenue via the US Federal Reserve due to concerns about Iranian-backed Iraqi militia behavior.[61]

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Endnotes

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Iran Update Special Report, May 8, 2026



**Ria Reddy, Ben Rezaei, Katherine Wells, Parker Hempel, Kelly Campa, Benjamin Schmida,
Brian Carter**

Analyst Notes: Data Cutoff: 2:00 PM ET

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Key Takeaways

1. Iranian officials continue to frame control over the Strait of Hormuz as a key strategic interest and a critical component of long-term Iranian deterrence. Iran likely views control over the strait as essential to restoring deterrence against the United States and Israel following the degradation of its other forms of deterrence.
2. The United States and Iran remain divided over key issues, particularly Iran's nuclear program, the status of Iran's highly enriched uranium (HEU) stockpile, and Iranian efforts to assert sovereignty over the Strait of Hormuz.
3. The United States has continued efforts to maintain an effective naval blockade against Iran as Iran continues to assert long-term sovereignty over the Strait of Hormuz.
4. Iran has continued to escalate rhetorically and militarily against the United Arab Emirates (UAE) amid Iranian attempts to portray the UAE as a hostile state supporting US and Israeli operations against Iran. Iran likely also seeks to demonstrate that continued US military actions against Iran will generate direct security and economic costs for Gulf states cooperating with the United States.
5. Confidential Russian documents, seen by *The Economist*, revealed a Russian proposal to offer Iran several thousand drones and training for Iranian drone operators, which raises concerns about the proliferation of fiber-optic drone technology to Iran and its regional proxies. Some of these proxies have already demonstrated the ability to employ these systems against US and allied targets.

Toplines

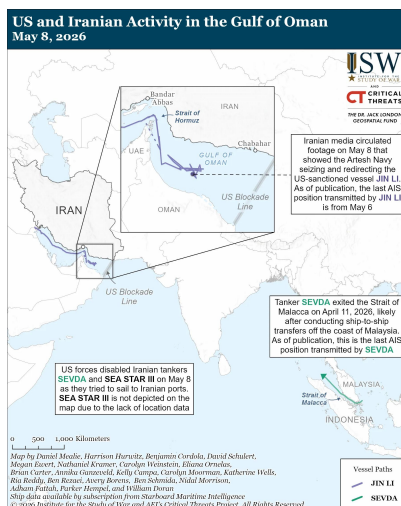
Iranian officials continue to frame control over the Strait of Hormuz as a key strategic interest and a critical component of long-term Iranian deterrence. Iran likely views control over the strait as essential to restoring deterrence against the United States and Israel following the degradation of its other forms of deterrence. Supreme Leader adviser Mohammad Mokhber stated in an interview with Iranian media that Iran’s position in the strait is similar to the strategic value of a nuclear weapon.[1] Mokhber’s role as an adviser to the supreme leader suggests that his statements, at least in part, reflect the regime’s thinking at the highest levels. Mokhber argued that control over a major economic chokepoint gives Iran the ability to affect the global economy “with one decision.”[2] He added that Iran “will not lose the strait under any circumstances.”[3] Mokhber’s statements are consistent with CTP-ISW’s assessment that Iran’s principal positive strategic objective at this time is to secure recognition of its sovereignty over the strait.[4] Mokhber’s characterization of the strait and his comparison between the strait and Iran’s nuclear program also reflect the regime’s evolving concept of deterrence. Iran appears to seek to use the strait as a future deterrent because its historical pillars of deterrence—including its missile and drone capabilities, proxy network, and air defense systems—have proven unable to deter major US or Israeli attack in June 2025 and Spring 2026. Iranian leaders may assess that the severe degradation of their traditional forms of deterrence requires Iran to assign greater strategic significance to the strait. Iran’s growing reliance on the strait suggests that the regime may not concede over control of the strait in negotiations, which is consistent with CTP-ISW’s ongoing assessment that some senior Iranian officials, including Islamic Revolutionary Guards Corps (IRGC) Commander Brigadier General Ahmad Vahidi who is currently driving decision-making within the regime, may prefer renewed confrontation over compromise if negotiations require Iran to relinquish control over the strait.[5]

Iran has continued to try to demonstrate its control over the Strait of Hormuz in order to sustain high global oil prices and pressure the United States into concessions. Iranian media circulated footage on May 8 that showed the Artesh Navy seizing and redirecting the vessel JIN LI in the Gulf of Oman.[6] The US Treasury sanctioned JIN LI (aka OCEAN KOI) in February 2026 for transporting millions of barrels of Iranian petroleum products since May 2025.[7] The vessel has operated as part of Iran’s shadow fleet since at least 2020.[8] A Chinese company, Ocean Kudos Shipping Company Limited, owns the vessel and is also sanctioned for its involvement in the shipment of Iranian petroleum products.[9] JIN LI previously traveled multiple times between Basra, Iraq, and Fujairah Port in the United Arab Emirates, and most recently was idling near Fujairah, but maritime data suggests that the vessel has spoofed its location.[10] It remains unclear whether the vessel was actively involved in Iran’s shadow fleet at the time of its seizure. Iranian media accused the vessel of disrupting Iranian oil exports and undermining Iranian national interests; however, this suggests that JIN LI may have attempted to transit the strait without coordination with the Iranian Armed Forces.[11] Iranian officials have repeatedly threatened to respond to vessels that transit the strait without such coordination.[12] Iran likely uses vessel seizures to reinforce perceptions that it controls access through the strait. These seizures increase risks for commercial shipping and contribute to higher global oil prices.

The United States and Iran remain divided over key issues, particularly Iran’s nuclear program, the status of Iran’s highly enriched uranium (HEU) stockpile, and Iranian efforts to assert sovereignty over the Strait of Hormuz. Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on May 8 that Iran is still reviewing the recent US proposal and will respond once Iran reaches a final decision.[13] Baghaei also stated on May 7 that Iran has decided to pursue negotiations in a “new format” through Pakistan and added that Iranian decisionmakers chose not to enter nuclear talks “for the time being.”[14] US President Donald Trump warned on May 8 that the United States could

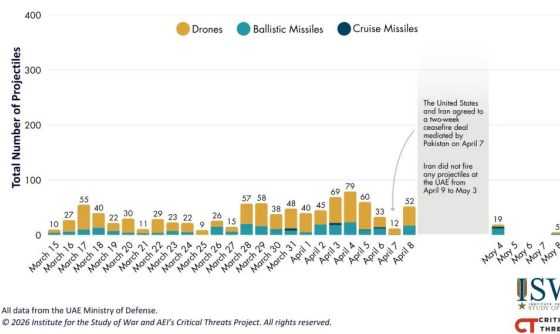
conduct renewed attacks if Iran does not quickly accept a deal.[15] Secretary of State Marco Rubio stated on May 8 that the United States expects an Iranian response soon and hopes it could begin a “serious process of negotiation.”[16] Iranian officials continue to signal unwillingness to compromise on core issues, particularly enrichment activities and Iranian control over the Strait of Hormuz, however.[17] Iran’s delayed response likely reflects continued internal disagreements and the apparent unwillingness of hardline actors, particularly IRGC Commander Major General Ahmad Vahidi and his allies, to make major concessions on core issues.[18]

The United States has continued efforts to maintain an effective naval blockade against Iran as Iran continues to assert long-term sovereignty over the Strait of Hormuz. US Central Command (CENTCOM) announced on May 8 that US naval forces have redirected 57 vessels since the blockade began on April 13.[19] CENTCOM also reported that US forces disabled two Iranian tankers, *Sea Star III* and *Sevda*, on May 8 after both vessels attempted to enter an Iranian port along the Gulf of Oman.[20] Iran would have presumably used the tankers to expand its floating oil storage capacity as the US blockade continues to strain the regime’s ability to store crude oil. Iran has already reactivated older tankers and repurposed empty vessels as temporary offshore oil storage to alleviate some of the mounting pressure on onshore facilities.[21] CENTCOM also stated on May 8 that US naval forces are currently preventing more than 70 tankers from entering or departing Iranian ports as part of the blockade.[22] These vessels collectively can hold more than 166 million barrels of Iranian oil, worth at least \$13 billion USD.



Iran has continued to escalate rhetorically and militarily against the United Arab Emirates (UAE) amid Iranian attempts to portray the UAE as a hostile state supporting US and Israeli operations against Iran. Iran likely also seeks to demonstrate that continued US military actions against Iran will generate direct security and economic costs for Gulf states cooperating with the United States. Iranian Parliament National Security and Foreign Policy Committee member Ali Khezrian stated on May 8 that Iran now considers the UAE a “hostile base” rather than a neighbor and claimed that the UAE helped facilitate attacks against Iran during the war.[23] Supreme Leader Advisor Mohammad Mokhber stated on May 8 that the UAE “has been punished” and “will be punished more.”[24] Iran has recently conducted a series of attacks against the UAE that likely seek, in part, to isolate the UAE from other Gulf states and drive a wedge between the UAE and the United States and Israel in response to the UAE’s strengthening cooperation with both countries.[25] The UAE Defense Ministry stated on May 8 that Emirati air defenses intercepted two Iranian ballistic missiles and three drones targeting the UAE.[26]

Iranian Ballistic Missiles, Cruise Missiles, and Drones Launched at the United Arab Emirates
Between March 15, 2026 and May 8, 2026



All data from the UAE Ministry of Defense.
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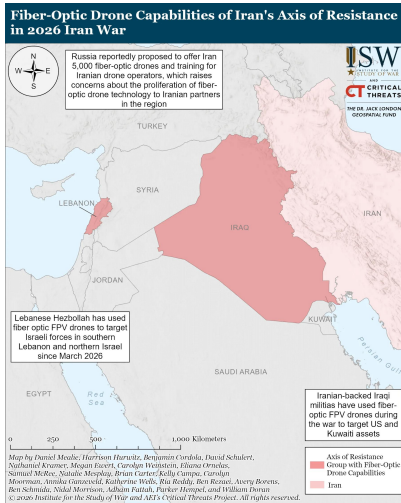


Confidential Russian documents, seen by *The Economist*, revealed a Russian proposal to offer Iran several thousand drones and training for Iranian drone operators, which raises concerns about the proliferation of fiber-optic drone technology to Iran and its regional proxies.[27]

The proposal offers Iran 5,000 short-range fiber-optic drones, an unspecified number of longer-range satellite-guided drones equipped with Starlink terminals, and training for Iranian personnel to operate both systems.[28] *The Economist* stated that it could not confirm whether Russian officials have presented the proposal to Iran yet. The documents are undated, but *The Economist* assessed that they likely originated during the first six weeks of the war when US officials were reportedly considering a possible ground operation in Iran. One diagram in the documents depicts Russian-trained Iranian drone operators attacking an amphibious landing force through coordinated drone swarms launched from concealed positions in response to a US operation to reopen the Strait of Hormuz or seize Kharg Island. Fiber-optic drones have limited utility in a maritime environment and have not been used at scale over the ocean in Ukraine. The documents do not specify which drone systems Iranian operators would use, but fiber-optic first-person view (FPV) drones have limited utility against commercial shipping unless operators specifically target vessel crews.[29] The limited utility is in part because fiber-optic FPV drones operating 55 kilometers from Iran’s shore in the Strait of Hormuz would have a limited warhead size due to the amount of fiber optic cable they could carry, even if fiber optic FPV drones could be made to operate over the Strait of Hormuz’s maritime environment. The limited warhead would have challenges generating functional kills on tankers by targeting the rudder or other systems. The fiber-optic drones would instead most likely support attacks against land targets, including amphibious vehicles and landing craft approaching the shore. The longer-range satellite-guided drones, however, could support maritime operations such as attacks on vessels. Reports of this proposal follow reports that Russia supplied Iran with satellite imagery of US bases and modified Shahed drones during the recent war.[30]

The reported Russian proposal further illustrates concerns about the proliferation of fiber-optic drones to Iranian proxy groups, some of which have already demonstrated the ability to employ these systems against US and allied targets. Iranian-backed Iraqi militias and Lebanese Hezbollah have both used fiber-optic first-person view (FPV) drones during the current conflict.[31] Likely Iranian-backed Iraqi militias conducted two fiber-optic drone attacks on Kuwaiti border posts in April 2026.[32] CTP-ISW previously assessed that Russia most likely transferred fiber-optic drone technology to Iran, which Iran then disseminated to Axis of Resistance groups, including Iraqi militias.[33] Hezbollah has conducted several fiber-optic FPV drone attacks against Israeli forces and positions in northern Israel and southern Lebanon since March 2026.[34] Hezbollah is likely assembling at least some of its fiber-optic drones in Lebanon based on photos of seized drone components, the relative ease of acquiring the necessary equipment to do so, and reported Israeli assessments in April that Hezbollah is assembling these drones domestically rather than receiving pre-assembled drones from Iran.[35] Israeli officials told *The Economist* that the IRGC has supplied Hezbollah with these fiber-optic drones, however.[36] It is unclear if this is an updated

Israeli assessment, but it is possible that Iran has supplied Hezbollah with at least some of the fiber-optic drones that the group has used in recent attacks against Israel. Russia’s reported willingness to provide Iran with fiber-optic drones could accelerate the spread of such advanced drone technology across Iran’s regional proxy network and increase the threat that these groups pose to US and allied forces and interests.



Maritime Development

See the topline section.

US and Israeli Air Campaign

The Institute for Science and International Security assessed on May 7 that US and Israeli airstrikes in 2026 targeted Iranian nuclear weaponization sites, following June 2025 strikes that disabled enrichment infrastructure.[37] Both strikes together increased the time and uncertainty for Iran to build a nuclear weapon using its existing uranium stockpiles, according to the institute.[38] The institute reported that the United States and Israel targeted six nuclear-related sites and three possible nuclear-related sites operated by the Organization of Defense Innovation and Research (SPND), which is responsible for Iran’s nuclear program.[39] The sites have a host of functions, including metallurgy, explosives research and production, neutronics, and diagnostics. The institute identified damage to the tunnel entrance at the Min-Zadayi complex, which is a partially underground facility east of Tehran City.[40] The IDF confirmed on March 3 that it struck this site because a group of nuclear scientists had moved to it after the June 2025 airstrikes to “[work] secretly to develop capabilities required for nuclear weapons.”[41] The institute identified that US and Israeli airstrikes also targeted exterior security measures at tunnel entrances, security checkpoints, and vehicles in the vicinity of major nuclear sites, such as the Esfahan Nuclear Technology Center and Pilot Fuel Enrichment Plant (PFEP) at the Natanz Nuclear Complex, but added that there was no significant additional damage to the facilities directly associated with uranium enrichment, probably because US airstrikes severely degraded or destroyed these enrichment facilities in June 2025.[42] The institute also detected no reconstruction efforts at these enrichment sites struck in June 2025.[43] US and Israeli airstrikes in 2026 targeted scientists and the SPND’s head and former head to eliminate key leaders who have experience constructing and managing nuclear facilities and research processes.[44]

The pattern of these strikes, which have focused on the entire system supporting Iran’s nuclear program, is similar to how the United States and Israel attacked Iran’s ballistic missile program. [45] The United

States and Israel degraded both Iranian ballistic missile forces—launchers and their crews and missile stockpiles—as well as the supporting infrastructure that allows the force to function and complete its mission. An Israeli source confirmed that Israel’s target list included all sites in what CNN described as an “ecosystem” for Iran’s nuclear program in April.[46] This “ecosystem” included university departments, specialized machinery, domestic uranium mining, processing, enrichment using advanced centrifuges, and storage sites.[47]

Iranian Internal Dynamics

Nothing significant to report.

Israeli Campaign Against Hezbollah and Hezbollah Response

Hezbollah responded to the Israeli strike that killed the Hezbollah Radwan Force commander by targeting the headquarters of the IDF’s 1st (Golani) Infantry Brigade near Nahariya, northern Israel. Hezbollah likely selected this target because this brigade’s headquarters is roughly equivalent to a Radwan Force headquarters, where the Radwan commander was killed. Hezbollah launched a retaliatory rocket attack on May 8 targeting the IDF Shraga base, which is the 1st (Golani) Brigade (36th Division) headquarters, located south of Nahariya, northern Israel.[48] The IDF reported that it intercepted one Hezbollah rocket and allowed other rockets to land in open areas, causing no casualties.[49] Hezbollah said that the attack was in response to Israeli ceasefire violations, including the Israeli strike in Beirut’s southern suburbs that killed Hezbollah Radwan Commander Ahmad Ghaleb “Malik” Balout on May 6.[50] Hezbollah likely conducted the retaliatory attack to signal to the group’s fighters and Israel that Hezbollah has the capability to respond to Israeli strikes against senior Hezbollah personnel. The Golani Brigade headquarters is a roughly equivalent target to Balout, who was in a Radwan Force headquarters at the time he was struck, because the Golani Brigade is a storied IDF unit with a history dating back to the founding of Israel.[51] The brigade is also currently operating in southern Lebanon. The IDF responded to the Hezbollah rocket attack later on May 8 by conducting airstrikes targeting Hezbollah launchers in Lebanon used in the attack on northern Israel, including strikes in the Bekaa Valley.[52]

Other Axis of Resistance Response

Nothing significant to report.

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Iran Update Special Report, May 9, 2026



Carolyn Moorman, Ria Reddy, Benjamin Schmida, Parker Hempel, 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.

Key Takeaways

1. Russia is supporting Iranian efforts to rebuild Iran's military capabilities during the ceasefire period. Russia is reportedly sending drone components to Iran via the Caspian Sea to help Iran rebuild its offensive capabilities following the war, according to US officials. Russian shipments of drone components to Iran support Iran's broader effort to restore its missile and drone capabilities ahead of a potential resumption of conflict with the United States and Israel.
2. Russia and the People's Republic of China (PRC) also supported Iranian attacks on US bases during the war. Russia and the PRC both provided Iran with satellite imagery of US and allied bases during the war.
3. Iran has not yet responded to the latest US proposal and will likely use any delay in negotiations to continue to rebuild its military capabilities. Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on May 9 that Iran is still reviewing the US proposal and will "pay no attention to...deadlines."

Toplines

Russia is supporting Iranian efforts to rebuild Iran's military capabilities during the ceasefire period. The *New York Times*, citing US officials, reported that Russia is sending drone components to Iran via the Caspian Sea to help Iran rebuild its offensive capabilities following the war.[1] Iran and Russia have historically used the Caspian Sea to trade non-military and military goods. The Israel Defense Forces (IDF) struck Bandar Anzali Port along the Caspian Sea during the war to disrupt Russian shipments of military equipment, including Shahed drones, artillery shells, and other ammunition, to Iran.[2] This report comes amid reports that Russia proposed giving Iran 5,000 short-range fiber-optic drones and an unspecified number of longer-range satellite-guided drones equipped with Starlink terminals. There is no evidence that the drone components Russia is providing to Iran during the ceasefire are related to fiber-

optic or first-person view drones, however. Russian shipments of drone components to Iran support Iran's broader effort to restore its missile and drone capabilities ahead of a potential resumption of conflict with the United States and Israel. Iran is attempting to recover weapons systems and launchers that it hid underground or that were buried under debris due to US and Israeli airstrikes.[3] Iran would likely use weapons systems and launchers that it retrieves to resume retaliatory attacks against US forces and regional countries if conflict resumes.



Russia and the People's Republic of China (PRC) also supported Iranian attacks on US bases during the war. The US State Department sanctioned four entities on May 8, including several Chinese companies, for providing satellite imagery to Iran to support Iranian attacks against US forces in the region during the war.[4] The sanctioned entities include Earth Eye and Chang Guand Satellite Technology, which are both based in the PRC and supplied Iran with satellite imagery of US and allied military facilities in the region.[5] Western media previously reported that Iran used an Earth Eye TEE-01B reconnaissance satellite that it acquired from the PRC in 2024 to target US military assets and bases across the Middle East during the war.[6] Russia similarly provided Iran with satellite imagery of US facilities and Shahed drones to support Iranian attacks during the war.[7]

The United States continues to target the PRC's support for the Iranian armed forces. The US Treasury Department sanctioned 10 individuals and companies on May 8, including several entities based in the PRC and Hong Kong, for supporting Iranian efforts to procure weapons components and raw materials used to produce drones and ballistic missiles.[8] It is unclear whether these entities have attempted to provide Iran with weapons components and raw materials during the ceasefire period. The PRC previously supported Iranian efforts to rebuild its ballistic missile program after the June 2025 Israel-Iran War by supplying sodium perchlorate, which is a chemical precursor for solid missile propellant, to Iran.[9]

Iran has not yet responded to the latest US proposal and will likely use any delay in negotiations to continue to rebuild its military capabilities (see above). Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on May 9 that Iran is still reviewing the US proposal and will "pay no attention to...deadlines." [10] US President Donald Trump told Fox News on May 6 that Iran had one week to reach a deal that ends the war and establishes a framework for future nuclear negotiations.[11] Iran's ability to enrich uranium, Iran's highly enriched uranium (HEU) stockpile, and the reopening of the Strait of Hormuz remain major sticking points between the two sides, however. Two sources with knowledge told Axios on May 8 that Qatar is serving as one of the intermediaries between the United States and Iran.[12] Qatari officials are reportedly in contact with senior Islamic Revolutionary Guards Corps (IRGC) officials involved in Iranian decision-making, US officials, and Pakistani

mediators.[13]

Maritime Development

Satellite imagery shows a possible large oil spill near Kharg Island in the Persian Gulf, but the cause of the possible oil spill remains unknown.[14] The *New York Times*, citing satellite imagery, reported on May 8 that there appears to be a large oil slick near Kharg Island.[15] Orbital EOS, which is a global oil spill monitoring service, told the *New York Times* that the possible spill covered more than 20 square miles on May 6 and that more than 3,000 barrels of oil may have been released.[16] The cause of the spill remains unclear, but energy experts told the *New York Times* that Iran's recent decision to store large volumes of crude oil in tanker vessels increases the risk of spills.[17] Iran has increasingly stored oil in tanker vessels due to the US naval blockade on Iranian ports, which has prevented Iran from exporting oil. Experts added that a rupture in the aging Abuzar oil field-Kharg Island undersea pipeline could be another possible cause, citing repeated leaks in recent years, including a breach in October 2024.[18] An Israeli OSINT analyst separately assessed that the slick was likely the result of an unspecified malfunction or Iran washing materials out of oil tanks.[19] Commercially available satellite imagery from May 9 shows that the spill has flowed southwards and dissipated significantly.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Internal Dynamics

Nothing significant to report.

Israeli Campaign Against Hezbollah and Hezbollah Response

Nothing significant to report.

Other Axis of Resistance Response

An Iraqi committee is reportedly close to finalizing an “executive plan” to disarm Iranian-backed Iraqi militias.[20] The Shia Coordination Framework authorized this committee to oversee the implementation of “mechanisms” to disarm the militias, classify the militias in a special database, and reintegrate militia members into Iraqi civil and security institutions, according to an informed source speaking to Iraqi media on May 9.[21] The committee's members include outgoing Prime Minister Mohammad Shia al Sudani, Prime Minister-designate Ali al Zaydi, and Badr Organization head Hadi al Ameri.[22] Iraqi media reported that the framework chose Ameri for this role because his ties to Iran are meant to “help build trust with the militias and persuade them to engage with the state.”[23] Badr has integrated itself into Iraqi state institutions to a greater extent than other Iranian-backed Iraqi militias since 2003.[24] The committee is expected to present its plan to disarm the militias to unspecified US officials “in the coming days.”[25] A senior political official told Asharq al Awsat that the plan involves the confiscation of militias' medium and heavy weapons, as well as the restructuring of the Iranian-backed

Popular Mobilization Forces (PMF), but did not provide further details about the plan.[26] The PMF is an Iraqi state security service that includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi Prime Minister.[27] Informed Iraqi sources also told Asharq al Awsat that the plan is unlikely to do more than “buy time” amid increased US pressure on the Iraqi federal government to disarm the militias.[28]

Multiple Iranian-backed Iraqi militias have rejected disarmament in recent days.

A spokesperson for an unidentified militia told Asharq al Awsat on May 8 that Kataib Sayyid al Shuhada, Harakat Hezbollah al Nujaba, and Kataib Hezbollah reject disarmament.[29] These militias have, both historically and during the war, been the most kinetically active and are more subordinate to Iran than other Iraqi militias.[30] Harakat Hezbollah al Nujaba leader Akram al Kaabi rejected disarmament on May 6 and called the group’s weapons a “red line.”[31] The Iraqi committee charged with disarming the militias has reportedly held meetings with unspecified Iraqi militia leaders in recent days to present them with “ideas on how to disarm and integrate,” with some meetings failing to “proceed calmly.”[32]

The Iraqi federal government’s disarmament efforts come amid increased US financial pressure on Iraq.

The United States has pressured the Iraqi federal government to reduce Iranian influence in Iraq, including via militia disarmament, since early 2025, but has bolstered its efforts in recent months due to militia attacks against US and foreign targets in Iraq and the region during the war.[33] US and Iraqi officials told the *Wall Street Journal* on April 22 that the US Treasury Department has temporarily halted shipments of Iraq’s oil export revenue via the US Federal Reserve due to concerns about militia behavior.[34] The officials said that the United States first blocked a shipment of oil export revenue to the Central Bank of Iraq in late February 2026 and recently blocked a cargo plane delivery of nearly \$500 million USD.[35] The Central Bank of Iraq has managed an account at the New York Federal Reserve on behalf of the Iraqi Finance Ministry since 2003 that holds the Iraqi federal government’s revenue from oil exports in US dollars.[36] Oil revenue accounts for about 90 percent of the Iraqi state’s budget.[37] The United States has also reportedly suspended its 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.[38] A senior Iraqi political source told Asharq al Awsat on May 8 that Iraqi security advisers have accelerated their efforts to develop militia disarmament and integration proposals due to mounting US pressure.[39]

The Iraqi federal government’s efforts to disarm the militias also come as Iran has reportedly pressured its Iraqi partners to end Iranian-backed Iraqi militia kinetic activity, likely to avoid US financial pressure against Iraq that negatively impacts Iran.

[40] Unidentified informed sources told Iraqi media on May 5 that Islamic Revolutionary Guards Corps Quds Force Commander Brigadier General Esmail Ghaani warned about “real dangers” that could result in a loss of unspecified military privileges and discussed the need for an “alternative plan” regarding militia disarmament during meetings with unspecified militias and framework leaders in Baghdad on April 18.[41] Ghaani reportedly proposed a militia disarmament plan that seeks to avoid provoking the United States by ending the kinetic role of some militias, while simultaneously consolidating Iranian influence in Iraq by further infiltrating Iranian-backed Iraqi actors into Iraqi government, diplomatic, and security institutions.[42] CTP-ISW continues to assess that Iran could decide to build a new, loyal cadre of ideological militias, over which Iran has strong control, that would supplement the political activity of Iranian-backed Iraqi actors. US financial pressure on Iraq, such as the US Treasury Department’s reported decision to halt shipments of Iraqi export oil revenue to Iraq, heavily impacts Iran due to Iran’s use of the Iraqi economy for sanctions evasion and to help fund the Axis of Resistance.[43]

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