

Iran Update Special Report, May 24, 2026



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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. Conflicting US, Iranian, and regional reporting indicates that the contours of a possible US-Iran memorandum of understanding (MOU) remain unresolved and may not yet represent a final agreement.
2. Iranian officials, Islamic Revolutionary Guards Corps (IRGC)-affiliated outlets, and Iranian sources speaking to Western and regional media are presenting the possible MOU as conditional on US concessions and continued Iranian leverage.
3. IRGC-affiliated reporting has identified frozen assets, sanctions relief, the naval blockade, Lebanon, and the Strait of Hormuz as the main unresolved issues. This is every issue in the first stage of the agreement, before talks on the nuclear program.
4. Mediators appear to be trying to preserve momentum toward a US-Iran MOU by sequencing unresolved issues and developing technical arrangements for the Strait of Hormuz, but Iranian reporting suggests that Iran has rejected efforts to defer its core demands.
5. Iran appears to believe that it is negotiating from a stronger position than the United States and is accordingly attempting to remake the regional order in a way that benefits Iran.
6. Iran has not publicly accepted meaningful nuclear concessions in the possible MOU, and Iran believes that the draft defers nuclear talks until after Iran secures relief from military and economic pressure.
7. Iranian officials have stated that the US-Iran MOU must end the war "on all fronts," including in Lebanon. The United States supports continued Israeli operations against Hezbollah, however, to prevent threats to Israel.
8. Israeli officials have reportedly called on the United States to allow the Israel Defense Forces (IDF) to continue its operations in Lebanon, in accordance with the current temporary ceasefire in Lebanon, and President Trump agreed with this position.
9. Hezbollah officials have continuously reiterated that the group will continue to engage the IDF in southern Lebanon and launch attacks against northern Israel until the IDF completely halts its

activity in Lebanon and withdraws from southern Lebanese territory.

Toplines

Conflicting US, Iranian, and regional reporting indicates that the contours of a possible US-Iran memorandum of understanding (MOU) remain unresolved and may not yet represent a final agreement. US President Donald Trump stated on May 23 that a deal to end the war had been “largely negotiated” and awaited finalization.[1] A senior US official stated in a briefing with reporters on May 24 that the White House does not expect an agreement on May 24 and believes Iranian leadership, including Supreme Leader Mojtaba Khamenei, may need several days to approve the deal.[2] An unspecified senior US official told Axios that the United States is in a “very good place” but that the parties are still negotiating specific language and that “whether this becomes an agreement is still an open question.”[3] Trump separately stated on May 24 that a possible Iran deal “isn’t even fully negotiated yet,” while stating that any agreement would not give Iran “a clear and open path to a Nuclear Weapon.”[4] Trump later stated that negotiations are proceeding in an “orderly and constructive manner,” but added that he had instructed his representatives “not to rush into a deal” because time is on the US side.[5] Trump also stated that the US naval blockade “will remain in full force and effect” until an agreement is “reached, certified, and signed.”[6]

Iranian officials, Islamic Revolutionary Guards Corps (IRGC)-affiliated outlets, and Iranian sources speaking to Western and regional media are presenting the possible MOU as conditional on US concessions and continued Iranian leverage. An unspecified senior Iranian official told Reuters on May 24 that the Supreme National Security Council (SNSC) will convene to approve or reject the current draft and will send it to Mojtaba for final approval if the SNSC approves it.[7] An unspecified senior Iranian source separately told CNN that recent mediated talks have made “a lot of progress” and could mark a “turning point” toward ending the war and creating a “new era of stability and prosperity” in the region.[8] IRGC-affiliated Tasnim News Agency reported on May 24 that disputes over one or two provisions remain unresolved due to US “obstruction” and that the MOU could still fall through if the United States does not meet Iranian demands.[9] US “obstruction” in this context probably refers to US insistence on legitimate demands that the Iranians oppose. **IRGC-affiliated reporting has identified frozen assets, sanctions relief, the naval blockade, Lebanon, and the Strait of Hormuz as the main unresolved issues.[10] This is every issue in the first stage of the agreement, before talks on the nuclear program.** Tasnim reported that an informed source said Iran will not accept any understanding without the release of a “specified portion” of Iran’s blocked assets in the first step and a clear mechanism to guarantee continued access to all blocked assets.[11] A well-informed Iranian source told an Al Jazeera journalist on May 24 that the two central issues involve the mechanism for unfreezing Iranian assets and the scope of a Lebanon ceasefire.[12] The source added that Iran rejected a Pakistani proposal to move ahead with agreed provisions while postponing unresolved ones.[13]

IRGC-affiliated messaging in domestic Iranian media has said that Iran will stick to its redlines, while quotes from unspecified Iranian officials in Western media have sought to portray the talks in a positive light by describing “progress.” Unspecified Iranian officials speaking to Western outlets have described progress and an internal approval process through the SNSC and Mojtaba, which suggests that some Iranian officials want to present the draft as a viable diplomatic path.[14] IRGC-affiliated outlets, however, have emphasized red lines, US “obstruction,” blocked assets, sanctions relief, and continued Iranian control over the Strait of Hormuz.[15]

Mediators appear to be trying to preserve momentum toward a US-Iran MOU by sequencing

unresolved issues and developing technical arrangements for the Strait of Hormuz, but Iranian reporting suggests that Iran has rejected efforts to defer its core demands. Reuters reported on May 23 that the “Pakistani army” described the negotiations as producing “encouraging” progress toward a final understanding, while two Pakistani sources involved in the talks said the deal under discussion is “fairly comprehensive to terminate the war.”[16] The sources added that the proposed framework would unfold in three stages, including formally ending the war, resolving the crisis in the Strait of Hormuz, and launching a 30-day window for negotiations on a broader agreement that could be extended.[17]

What is in the US-Iran “Agreement”: Everyone Involved Has a Different Idea

SWP
INSTITUTE FOR THE STUDY OF WAR
CENTRAL INTELLIGENCE ANALYTICAL REPORT

As published on May 23, 2020 at 2:04 PM ET unless otherwise specified.

	United States	Iran
Is there a deal?	<ul style="list-style-type: none"> A senior US official claimed to Axios that Supreme Leader Mohallab Qhatami approved the “road outline” of an agreement. Other US officials have claimed that no deal has been agreed. 	<ul style="list-style-type: none"> Supreme leader Mojtaba Qhatami has not approved the framework agreement of this time, according to an Iranian official speaking to Reuters. Iranian law updated the report on May 24 and deleted the text referring to Qhatami’s approval.
Nuclear Non-Proliferation Commitment	<ul style="list-style-type: none"> Trump has previously emphasized preventing Iran from acquiring a nuclear weapon as a core war aim. 	<ul style="list-style-type: none"> Iranian President Rouhani has expressed opposition to acquiring nuclear weapons. Supreme leader Mojtaba Qhatami and his inner circle have made no such commitment on this issue.
Iranian Enrichment	<ul style="list-style-type: none"> A US and Israeli source claimed that Trump has demanded that Iran forgo uranium enrichment completely. 	<ul style="list-style-type: none"> Iranian officials have opposed any new restrictions on their uranium enrichment in recent years, describing it as a “red line.”
Highly Enriched Uranium Supply	<ul style="list-style-type: none"> Trump demanded on May 21 that Iran export its highly enriched uranium as a key requirement for a deal. 	<ul style="list-style-type: none"> Supreme leader Mojtaba Qhatami reportedly prohibited the export of high enriched uranium as part of the deal. Some Iranian sources disputed this claim, however. Iranian state media reported that Iran has made no commitments to export high enriched uranium. State media reported that the framework deal contains no explicit measures regarding the nuclear program.
Lebanon	<ul style="list-style-type: none"> Trump has expressed support for the Israeli desire to retain freedom of action against potential threats, including in Lebanon. 	<ul style="list-style-type: none"> Iranian officials have insisted that the deal must end war on all fronts, including Lebanon. Iran will likely reject any agreement that allows Israeli operations to continue in Lebanon.
Scale of Forces	<ul style="list-style-type: none"> Trump specified that the deal includes “keeping the area” but did not elaborate upon whether Iran would exercise sovereignty and have permanent control. Rubio has previously said that the United States will not tolerate Iranian “management” of the strait. 	<ul style="list-style-type: none"> Iranian officials continue to insist that they have sovereignty over the strait and will retain permanent control over it, which could include changing tolls. Iranian officials have expressed readiness to reopen the strait to some commercial traffic in exchange for the United States ending its blockade of Iran over a 30-day period. Iranian state media has claimed that the United States will have permission to interfere with the movement of Iranian ships.
Sanctions and Economic Issues	<ul style="list-style-type: none"> Trump said that the potential deal would be the “most generous” of any that gives Iran economic relief. A US official expressed readiness to give sanctions relief to Iran in exchange for nuclear concessions. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of all sanctions on Iran.

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CENTRAL INTELLIGENCE ANALYTICAL REPORT

Done as of May 24, 2020 at 1:08 PM ET

	Iran	Other Mediators
Is there a deal?	<ul style="list-style-type: none"> Nothing significant to report. 	<ul style="list-style-type: none"> Mediators are attempting to pressure maximum towards an agreement. Pakistan reportedly asked to meet forward with “agreed” issues as part of the framework agreement and postpone discussions on more contentious issues. It is unclear, however, on what issues any party has agreed to.
Lebanon	<ul style="list-style-type: none"> Natanyahu has refused to end Israeli operations in Lebanon. Hezbollah has similarly refused to end operations absent a complete Israeli withdrawal, which means that for a successful agreement, Israel must also withdraw from Lebanon. Israeli sources reported that Trump agreed with Netanyahu’s position. Israel has reportedly pushed Netanyahu to include language that means Israel can respond to “any threat” in Lebanon. The Iranian wording of the alleged terms of the framework agreement are at odds with both Israel and Trump’s position on Lebanon. 	<ul style="list-style-type: none"> Nothing significant to report.
Strait of Hormuz	<ul style="list-style-type: none"> Israeli officials have expressed opposition to any deal that permits Iran to use the Strait of Hormuz for coercion and deterrence, thus rejecting Iranian offers to establish permanent control of the strait. 	<ul style="list-style-type: none"> A Pakistani official alluded vaguely to “keeping” the Strait of Hormuz but did not mention whether Iran would exercise sovereignty and have permanent control.
Sanctions and Economic Issues	<ul style="list-style-type: none"> Israeli officials fear that the deal will allow Iran to recover economically and militarily, which will make a resumption of fighting more difficult. This implies Israel would oppose sanctions relief or the release of frozen funds, given that these would benefit Iran. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of all sanctions on Iran.
Other Nuclear Issues	<ul style="list-style-type: none"> Israeli officials are concerned about the lack of clarity around the US and Iran’s second stage of negotiations, during which the two countries would discuss nuclear issues. 	<ul style="list-style-type: none"> Nothing significant to report.
Iranian Enrichment	<ul style="list-style-type: none"> Israeli officials have said during and before the war that Iran must be unable to enrich uranium. 	<ul style="list-style-type: none"> Saudi media reported on May 23 that Iran offered to suspend uranium enrichment above 3.6 percent for the next decade. This report is unconfirmed, however.

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Iran appears to believe that it is negotiating from a stronger position than the United States and is accordingly attempting to remake the regional order in a way that benefits Iran. Supreme Leader’s military adviser and former IRGC Commander Major General Mohsen Rezaei claimed on May 24 that the United States is in a “complete stalemate” and warned that any renewed war would begin at the strait and expand through the Bab el Mandeb and the Indian Ocean.[18] Rezaei also claimed that Iran has kept the strait open to free trade while requiring vessels to be “identified and registered,” which supports Iran’s efforts to normalize an Iranian permission-based transit regime.[19] IRGC Navy Public Relations reported on May 24 that 33 ships, including oil tankers, container ships, and other commercial vessels, passed through the Strait of Hormuz over the past 24 hours after obtaining permission and with IRGC Navy coordination and security.[20] Khatam ol Anbia Central Headquarters Commander Major General Ali Abdollahi Aliabadi separately said on May 24 that Mojtaba’s plans to manage the Persian Gulf and the Strait of Hormuz will shape a “new regional and global order” under the “Strong Iran” strategy, “in which foreigners will have no place.”[21] IRGC-affiliated Fars News separately

framed the talks in an Op-Ed on May 24 as a vehicle to secure concrete economic gains rather than broader political conciliation with the United States.[22] IRGC-affiliated Tasnim also reported that Iran would return ship traffic through the strait to pre-war numbers within 30 days, while the United States would fully lift the naval blockade in the same period.[23]



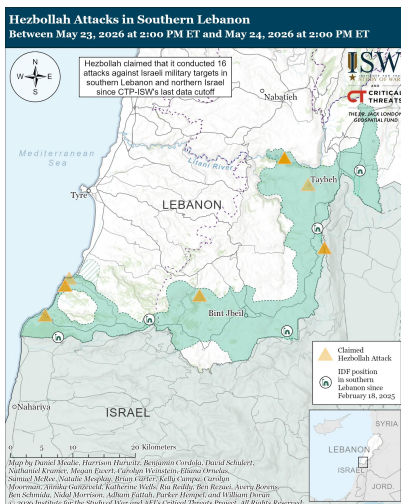
Iran has not publicly accepted meaningful nuclear concessions in the possible MOU, and Iran believes that the draft defers nuclear talks until after Iran secures relief from military and economic pressure. Tasnim denied reports that Iran committed to remove nuclear material from the country or suspend nuclear activity for 10 to 20 years, claiming instead that Iran has made no nuclear-related commitments at this stage and will only discuss nuclear issues after the possible end of the war and after the United States “implements certain measures.”[24] A senior Iranian source separately told Reuters that the nuclear issue is not part of the memorandum and that Iran has not agreed to hand over its highly enriched uranium stockpile.[25] Mohsen Rezaei separately threatened that Iran may withdraw from the Nuclear Non-Proliferation Treaty in response to US military action against the Strait of Hormuz or the Persian Gulf, further linking Iran’s nuclear posture to its effort to deter US military pressure around the strait.[26] Western and regional reporting has presented a different version of the nuclear issue, however. Two US officials told the *New York Times* on May 23 that one key element of the proposed agreement is a reported Iranian commitment to give up its highly enriched uranium stockpile.[27] It remains unclear how Iran would give up the stockpile and leaves those details for a future round of nuclear talks, according to US officials.[28]

Iranian officials have stated that the US-Iran MOU must end the war “on all fronts,” including in Lebanon.[29] The United States supports continued Israeli operations against Hezbollah, however, to prevent threats to Israel. Iranian officials speaking to the *New York Times* and IRGC-affiliated media separately claimed on May 24 that the US-Iran MOU text specifically states that there must be a complete end to the war “on all fronts,” including in Lebanon.[30] Iranian Foreign Minister Abbas Araghchi sent a letter to Hezbollah Secretary General Naim Qassem on May 23 confirming that Iran has linked negotiations to securing a complete ceasefire in Lebanon, according to Hezbollah-affiliated media.[31]

Israeli officials have reportedly called on the United States to allow the Israel Defense Forces (IDF) to continue its operations in Lebanon, in accordance with the current temporary ceasefire in Lebanon, and President Trump agreed with this position.[32] An Israeli official released a statement to Western media on May 24 saying that Israeli Prime Minister Netanyahu, during a phone call with US President Trump on May 23, emphasized that Israel will maintain its freedom of action in Lebanon.[33] President Trump agreed with Israel’s position. An Iranian source told a Qatari media journalist on May 24 that Israel is

reportedly calling for the United States to include language in the MOU that allows the IDF to continue to conduct military actions in Lebanon in response to “any threat,” similar to the current temporary ceasefire between Israel and Lebanon which contains a provision that permits the IDF to act in self-defense against any “planned, imminent, or ongoing” Hezbollah threats against Israel.[34] The Iranian source stated that Iran rejects including a similar provision in the MOU and insists upon a complete ceasefire in Lebanon.[35]

Hezbollah officials have continuously reiterated that the group will continue to engage the IDF in southern Lebanon and launch attacks against northern Israel until the IDF completely halts its activity in Lebanon and withdraws from southern Lebanese territory.[36] Qassem has repeatedly stated that Israel must completely halt its operations, withdraw from southern Lebanese territory, release prisoners, and allow southern Lebanese residents to return home for Hezbollah to agree to a total ceasefire.[37] Qassem also stated that Hezbollah currently seeks to inflict maximum IDF casualties to prevent the IDF from establishing operational control over the IDF buffer zone in southern Lebanon.[38] Israeli officials have continuously stated that the IDF will remain in a buffer zone in southern Lebanon to protect northern Israeli communities from ongoing and future Hezbollah attacks.[39] The IDF and Hezbollah have also increasingly clashed in direct engagements in southern Lebanon in recent weeks as the IDF has expanded its operational control over territory in southern Lebanon and prepared for further advances. The IDF announced on May 12 that it crossed the Litani River and developed a bridgehead to facilitate ground force movement north of the river, and Hezbollah mounted a prolonged, direct-fire defense against a separate advancing Israeli force in southern Lebanon on May 19 and May 20, for example.[40] The IDF has also built new roadways within its area of operational control along major Israeli axes of advance, likely to sustain ground operations and logistical bases.[41]



The IRGC Aerospace Force used a UAE-based company to acquire advanced Chinese satellite equipment in late 2025, according to leaked documents cited by the *Financial Times* on May 24.[42] The company facilitated the shipment of Chinese-made satellite antenna equipment to Iran via the Jebel Ali port in Dubai on behalf of an IRGC Aerospace Force front company in late 2025.[43] The US Treasury Department previously sanctioned several Chinese companies in May 2026 for providing satellite imagery to Iran to support Iranian attacks against US forces in the region during the war.[44]

Maritime Developments

Nothing significant to report.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Internal Dynamics

Nothing significant to report.

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See the topline section.

Other Axis of Resistance Activity

Nothing significant to report.

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Endnotes

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Key Takeaways

1. The United States and Iran continue to hold fundamentally different positions on most major issues within the US-Iran "agreement." Iran has not publicly committed to removing its highly enriched uranium (HEU) stockpiles or to halting uranium enrichment in Iran, reinforcing broader uncertainty around the negotiations. US President Donald Trump said on May 25 that any deal with Iran must be "great and meaningful," and explicitly rejected "anything like the Joint Comprehensive Plan of Action (JCPOA)."
2. Iran has continued to claim that it and Oman control the Strait of Hormuz as territorial waters. Iranian officials are attempting to reframe transit tolls as "protection fees" to give Iran's protection racket the veneer of legality. The Strait of Hormuz is an international waterway under international law. Iran is claiming that the strait is territorial waters and under the administration of "coastal" states. It is notable in this context that Iran does not define the United Arab Emirates (UAE) as a coastal state, even though the UAE borders the strait.
3. US President Donald Trump urged on May 25 the leaders of Saudi Arabia, Qatar, Pakistan, Egypt, Turkey, and Jordan to join the Abraham Accords.
4. Hezbollah drone operators have likely developed a rudimentary tactical approach to coordinate multiple small first-person view (FPV) drone strikes in a short period of time. The "swarm" attacks appear to employ three or more drones operating in a staggered but near-simultaneous manner. This system is extremely rudimentary and would either require a single commander to coordinate the attack or a preset, prioritized list of strikes that cannot be dynamically changed. Hezbollah will likely attempt to overcome the shortcomings of this tactical approach.

Toplines

The United States and Iran continue to hold fundamentally different positions on most major issues within the US-Iran "agreement." Iran has not publicly committed to removing its highly

enriched uranium (HEU) stockpiles or to halting uranium enrichment in Iran, reinforcing broader uncertainty around the negotiations. Iran has so far been unwilling to transfer its HEU stockpile outside Iran, and officials and media consistently assert that any US demand for zero enrichment—or even a return to Joint Comprehensive Plan of Action (JCPOA) — level enrichment at 3.6% — is a red line for Iran.[1] US President Donald Trump said on May 25 that any deal with Iran must be “great and meaningful,” and explicitly rejected “anything like the JCPOA.”[2]

These two positions on the nuclear issue are fundamentally at odds, even as talks continue and the United States has offered various concessions to attempt to get Iran to give up on aspects of its nuclear program. Unspecified mediators also told the *Wall Street Journal* on May 25 that the United States is seeking firm upfront nuclear commitments and fears that Iran may delay on these commitments.[3] US officials have reportedly offered sanctions relief in return for Iran handing over its HEU stockpile, according to a senior US official, but unspecified mediators told the *Wall Street Journal* that Iran still seeks “clearer guarantees” on sanctions relief and access to frozen assets.[4] An Iranian delegation, led by Parliament Speaker Mohammad Bagher Ghalibaf, met senior Qatari officials in Doha on May 25, reportedly to discuss negotiations, including Iran’s HEU stockpile and access to frozen assets, though no concrete outcomes have been publicly confirmed.[5] Iranian Foreign Affairs Minister Abbas Araghchi and Central Bank Governor Abdol Nasser Hemmati attended the meeting too.[6]

Saudi state media has continued to portray the talks in a positive light, even while public positions have so far failed to change. Saudi media stated on May 25 that a draft US–Iran memorandum of understanding (MOU) outlines a phased deal involving a renewable 60-day ceasefire, continued nuclear talks, regional de-escalation, restoration of navigation in the Strait of Hormuz, gradual sanctions relief, and partial release of frozen Iranian assets.[7] Saudi media did not elaborate as to whether or not either side had agreed to any of the provisions in the draft. Saudi media also reported that Iran is willing to transfer its HEU stockpile to the People’s Republic of China (PRC) but is seeking guarantees from the PRC before continuing with the agreement with the United States.[8] These outlets have previously been premature when discussing Iran’s threshold for agreement when it comes to its nuclear program, however. Islamic Revolutionary Guards Corps (IRGC)-affiliated media swiftly denied the Saudi media report on the MOU terms.[9]

Iran has continued to claim that it and Oman control the Strait of Hormuz as territorial waters. Iranian officials are attempting to reframe transit tolls as “protection fees” to give Iran’s protection racket the veneer of legality. The Strait of Hormuz is an international waterway under international law. Iran is claiming that the strait is territorial waters and under the administration of “coastal” states. It is notable in this context that Iran does not define the United Arab Emirates (UAE) as a coastal state, even though the UAE borders the strait.[10] The Iranian Ministry of Foreign Affairs spokesperson has attempted to reframe transit tolls as “protection fees” and “environmental fees,” but both of these are tolls, and neither is legal in an international waterway.[11] Iran remains the only power that has threatened civilian shipping in the Strait of Hormuz during this war, meaning that its “protection fee” is a protection racket that ships must pay to avoid Iranian attack. US officials are explicitly against any fee system in the Strait of Hormuz, and this issue remains a core disagreement in ongoing talks.[12]

What is in the US-Iran "Agreement": Everyone Involved Has a Different Idea

Position Rehearsed Between May 24, 2024 at 2:00 PM ET and May 25, 2024 at 2:00 PM ET

88 updates as of May 15, 2024 at 1:40 PM ET when updates stopped.

	United States	Iran
Is there a deal?	<ul style="list-style-type: none"> A senior US official claimed to Axios that Supreme Leader Mojibbo Khatami approved the "final outline" of an agreement. Other US officials have denied that no deal has been agreed. 	<ul style="list-style-type: none"> Supreme Leader Mojibbo Khatami has not approved the framework agreement to this time, according to an Iranian official speaking to Reuters. Reuters later updated the report on May 24 and deleted the text referring to Khatami's approval.
Nuclear Non-Proliferation Commitment	<ul style="list-style-type: none"> Trump has previously emphasized preventing Iran from acquiring or nuclear weapons as a core war aim. 	<ul style="list-style-type: none"> Iranian President Raisi has expressed opposition to pursuing nuclear weapons. Supreme leader Mojibbo Khatami and his inner circle have made no such comments at this time.
Iranian Enrichment	<ul style="list-style-type: none"> A US and Israeli source claimed that Trump has demanded that Iran forgo uranium enrichment completely. 	<ul style="list-style-type: none"> Iranian officials have opposed any new restrictions on their uranium enrichment in recent years, describing it as a "red line."
Highly Enriched Uranium Stockpile	<ul style="list-style-type: none"> Trump demanded on May 21 that Iran export its highly enriched uranium as a key requirement for a deal. 	<ul style="list-style-type: none"> Supreme leader Mojibbo Khatami reportedly prohibited the export of high enriched uranium as part of the deal. Some Iranian sources denied this claim. Iranian state media reported that Iran has made no commitments to export high enriched uranium. State media reported that the framework deal contains no explicit measures regarding the nuclear program.
Lebanon	<ul style="list-style-type: none"> Trump has expressed support for the Israeli desire to ensure freedom of action against potential threats, including in Lebanon. 	<ul style="list-style-type: none"> Iranian officials have insisted that the deal must end war on all fronts, including Lebanon. Iran will likely reject any agreement that allows Israeli operations to continue in Lebanon.
 Strait of Hormuz	<ul style="list-style-type: none"> Trump specified that the deal includes "requiring the Strait" but did not elaborate upon whether Iran would exercise sovereignty and have permanent control. Katiba has previously said that the United States will not restore Iranian "management" of the Strait. 	<ul style="list-style-type: none"> Iranian officials continue to insist that they have sovereignty over the Strait and will retain permanent control over it, which could include charging tolls. Iranian officials have expressed readiness to reopen the Strait to some commercial traffic in exchange for the United States ending its blockade of Iran over a 20-day period. Iranian state media has claimed that the United States will have permission to interfere with the movement of Iranian ships.
Sanctions and Frozen Funds	<ul style="list-style-type: none"> Trump said that the potential deal would be the "next step" of any that ends the economic siege. A US official expressed readiness to give sanctions relief to Iran in exchange for nuclear concessions. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of all sanctions on Iran.

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What is in the US-Iran "Agreement": Everyone Involved Has a Different Idea

Position Rehearsed Between May 24, 2024 at 2:00 PM ET and May 25, 2024 at 2:00 PM ET

88 updates as of May 15, 2024 at 1:40 PM ET when updates stopped.

	Israel	The Middle East
Is there a deal?	<ul style="list-style-type: none"> Nothing significant to report. 	<ul style="list-style-type: none"> Mediators are attempting to preserve momentum towards an agreement. Pakistan reportedly asked to meet forward with "agreed" issues as part of the framework agreement and postpone discussions on more contentious issues. It is unclear, however, on what issues any party has agreed to.
Lebanon	<ul style="list-style-type: none"> Hezbollah has refused to end Israeli operations in Lebanon. Hezbollah has earlier refused to end operations absent a complete Israeli withdrawal, which means that for a successful agreement, Israel must also withdraw from Lebanon. Israeli sources reported that Trump agreed with Netanyahu's position. Israel has reportedly pushed Washington to include language that means Israel can respond to "any threat" in Lebanon. The Iranian rendering of the alleged terms of the framework agreement are at odds with both Israel and Trump's position on Lebanon. 	<ul style="list-style-type: none"> Nothing significant to report.
 Strait of Hormuz	<ul style="list-style-type: none"> Israeli officials have expressed opposition to any deal that permits Iran to use the Strait of Hormuz for coercion and deterrence, thus rejecting Iranian offers to establish permanent control of the Strait. 	<ul style="list-style-type: none"> A Pakistan official alluded vaguely to "reopening" the Strait of Hormuz but did not mention whether Iran would exercise sovereignty and have permanent control.
Sanctions and Frozen Funds	<ul style="list-style-type: none"> Israeli officials fear that the deal will allow Iran to recover economically and militarily, which will make a resumption of fighting more difficult. This implies Israel would oppose sanctions relief or the release of frozen funds, given that these would benefit Iran. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of all sanctions on Iran.
Other Middle Eastern Issues	<ul style="list-style-type: none"> Israeli officials are concerned about the lack of clarity around the US and Iran's second stage of negotiations, during which the two countries would discuss nuclear issues. 	<ul style="list-style-type: none"> Nothing significant to report.
Iranian Enrichment	<ul style="list-style-type: none"> Israeli officials have said during and before this war that Iran must be unable to enrich uranium. 	<ul style="list-style-type: none"> State media reported on May 23 that Iran offered to suspend uranium enrichment above 3.0 percent for the next decade. This report is unconfirmed, however.

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US President Donald Trump urged on May 25 the leaders of Saudi Arabia, Qatar, Pakistan, Egypt, Turkey, and Jordan to join the Abraham Accords.[13] Trump said that Saudi Arabia and Qatar should be the first countries to do so and added that a failure to join the Abraham Accords “shows bad intention.”[14] Turkey, Egypt, and Jordan currently recognize Israel but are not members of the Accords.[15]

Hezbollah drone operators have likely developed a rudimentary tactical approach to coordinate multiple small first-person view (FPV) drone strikes in a short period of time. Hezbollah has posted at least three separate examples of these operations, which they call “swarm” attacks. Normal Hezbollah FPV drone attacks have a simple three-step process: first, a drone conducts reconnaissance. Next, commanders evaluate the drone footage in real-time to determine and select possible targets. Finally, a second drone executes the strike. The “swarm” attacks appear to employ three or more drones operating in a staggered but near-simultaneous manner.[16] The first drone selects and strikes its target.[17] The second drone then takes footage of the first drone’s target, likely to conduct a hasty battle damage assessment (BDA) to determine whether a re-strike is necessary.[18] A Hezbollah drone in a “swarm” attack in Biyyadah on May 15 re-struck a Humvee, for example, after an earlier drone struck the same target.[19] This footage also serves a propaganda role, and Hezbollah is releasing this footage publicly.[20] The second drone then conducts its own strike.[21] The Hezbollah drone operators repeat this process for each drone thereafter.[22] This system is extremely rudimentary and would either require a single commander to coordinate the attack or a preset, prioritized list of strikes that cannot be dynamically changed.

Hezbollah will likely attempt to overcome the shortcomings of this tactical approach. The requirement for a single commander and subsequent drones to execute the BDA slows Hezbollah's targeting cycle and will prevent it from executing simultaneous attacks with drones. Hezbollah, as a learning military organization, will not be satisfied with these constraints and will seek to improve its approach, especially as the IDF develops new countermeasures.[23]

Hezbollah has illustrated this tactical approach in its publicly released video footage on at least three occasions. Hezbollah posted footage of several drones striking an IDF border post in northern Israel on May 12, which Israeli media and Hezbollah subsequently called a "swarm attack." [24] Israeli media expressed concern over the increasingly complex Hezbollah capabilities in this instance. [25] Hezbollah also posted footage on May 24 showing an attack using several FPV drones to target Israel Defense Forces (IDF) vehicles and positions in Rachaf, Bint Jbeil District, on May 21. [26] Rachaf is adjacent to Haddatha, where Hezbollah recently fought a protracted engagement with IDF forces on May 20 and 21. [27]

Maritime Developments

See the topline section.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Internal Dynamics

Iranian President Masoud Pezeshkian ordered the Communications Ministry on May 25 to end the internet shutdown that Iran began in response to the January 2026 protest movement. [28] Internet access is expected to return to the pre-January "status quo." [29] ISW-CTP has continuously assessed that Iran's prolonged internet shutdown posed severe economic damage and accelerated unemployment, which likely increased pressure on regime stability. [30] The Iranian Supreme National Security Council (SNSC) has not yet approved Pezeshkian's order. An IRGC-affiliated media outlet questioned Pezeshkian's ability to rescind the shutdown order, given that the SNSC originally issued the order. [31]

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See the topline section.

Other Axis of Resistance Activity

The Shia Coordination Framework is reportedly divided over a US proposal to disarm Iranian-backed Iraqi militias and dissolve or integrate the Popular Mobilization Forces (PMF). 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. [32] A framework source told Iraqi media on May 25 that some

framework members with armed wings threatened to leave the framework if it supports a US proposal to dissolve the PMF, while others expressed a willingness to disarm and engage with Iraqi politics in exchange for securing “senior positions” within the Iraqi government.[33] Multiple Iranian-backed Iraqi militias, including Kataib Hezbollah, the Badr Organization, and Asaib Ahl al Haq, have political wings that are part of the framework and control some PMF brigades.[34] The details of this US proposal are unclear at the time of this writing. This report comes as an Iraqi committee comprised of Iranian-backed Badr Organization head Hadi al Ameri, Prime Minister-designate Ali al Zaydi, and caretaker Prime Minister Mohammad Shia al Sudani is reportedly close to finalizing an “executive plan” to disarm the Iraqi militias.[35] The plan includes the confiscation of militias’ medium and heavy weapons and the restructuring of the PMF, according to a senior Iraqi political official speaking to regional media on May 9.[36] The United States has pressured the Iraqi federal government to curb Iranian influence in Iraq, including via militia disarmament, since early 2025, but has intensified its efforts in recent months due to militia attacks against US and foreign targets in Iraq and the region during the war.[37]

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Iran Update Special Report, May 26, 2026



Katherine Wells, Adham Fattah, Parker Hempel, Carolyn Moorman, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Iran and the United States have not bridged key differences on all the major demands in the US-Iran talks. Iranian officials said that they are unwilling to discuss their nuclear program on May 25, and Iranian regime media on May 25 insisted that the United States observe Iran's right to enrich uranium on Iranian territory.
2. Granting Iran economic relief by unfreezing funds or removing sanctions would likely decrease Iranian military reconstitution timelines. Iran reportedly demanded that the US immediately release the first half of frozen Iranian assets upon signing the agreement and the second half of the assets within 60 days, according to Islamic Revolutionary Guards Corps (IRGC) media on May 26.
3. Iran is also refusing to reopen the Strait of Hormuz and using force to ensure the recognized traffic separation scheme remains closed. Iran used force again on May 25 to maintain its illegitimate traffic separation scheme when it attempted to deploy mines in the Strait of Hormuz.
4. Iranian Supreme Leader Mojtaba Khamenei released a statement on May 26 reaffirming the regime's commitment to the principles of the Islamic Revolution and his father's grand strategy - namely, a commitment to the destruction of Israel, the expulsion of US forces from the region, and the formation of a "new Islamic civilization" united against the United States. Khamenei emphasized that "Death to America [and Israel]" will again be the slogan of Iran and the Islamic world.

Toplines

Iran and the United States have not bridged key differences on all the major demands in the US-Iran talks. Iranian officials said that they are unwilling to discuss their nuclear program on May 25, and Iranian regime media on May 25 insisted that the United States observe Iran's right to enrich uranium on Iranian territory.[1] Mediators and US officials added that the United States will not provide economic relief to Iran without serious commitments from Iran on its nuclear program.[2] This represents

a major impasse in talks because Iran refuses to discuss its nuclear program without economic relief. US President Donald Trump stated on Truth Social on May 26 that Iran's highly enriched uranium (HEU) must be "immediately turned over" to the United States or else destroyed where it is within Iran or at another "acceptable location" with verification.[3] The two sides remain far apart on the Strait of Hormuz, as well, which is discussed in greater detail below.

Granting Iran economic relief by unfreezing funds or removing sanctions would likely decrease Iranian military reconstitution timelines. Iran reportedly demanded that the US immediately release the first half of frozen Iranian assets upon signing the agreement and the second half of the assets within 60 days, according to Islamic Revolutionary Guards Corps (IRGC) media on May 26.[4] The exact amount of these assets is unclear.[5] The Iranian Foreign Affairs Ministry spokesperson explicitly said that Iran would use its unfrozen assets to reconstitute and improve the ballistic missile and drone programs.[6] Iranian officials have also called for the United States to lift the US Navy blockade and sanctions on oil as part of the deal for at least 30 to 60 days.[7] Detailed reconstitution timelines do not exist in the open-source, and intelligence leaks about these timelines are impossible to judge on their own merits due to the lack of context provided in leaks.[8] ISW-CTP has previously assessed that Iran would likely need a longer period of time to reconstitute its missile program than it did after the June 2025 strikes because the combined force struck many more production targets than Israel did in June 2025.[9] This relative assessment — as well as any more detailed assessment — relies on various assumptions about the amount of funds Iran can put towards reconstitution and rebuilding of its military forces, among other factors. Unfreezing funds or dropping sanctions gives Iran relatively more funds to put towards reconstitution.

What is in the US-Iran "Agreement": Everyone Involved Has a Different Idea

48 minutes on May 24, 2025 at 3:00 PM ET unless otherwise specified. **Position Rehearsed Between May 25, 2024 at 2:00 PM ET and May 26, 2024 at 2:00 PM ET**

	United States	Iran
Is there a deal?	<ul style="list-style-type: none"> A senior US official claimed to Axios that Supreme Leader Mojibbo Khamenei approved the "final outline" of an agreement. Other US officials have clarified that no deal has been signed. 	<ul style="list-style-type: none"> Supreme Leader Mojibbo Khamenei has not approved the framework agreement or its text, according to an Iranian official speaking to Reuters. Reuters later updated the report on May 24 and deleted the text referring to Khamenei's approval.
Nuclear Non-Proliferation Commitment	<ul style="list-style-type: none"> Trump has previously emphasized preventing Iran from acquiring a nuclear weapon as a core war aim. 	<ul style="list-style-type: none"> Iranian President Raisi has expressed opposition to pursuing nuclear weapons. Supreme Leader Mojibbo Khamenei and his inner circle have made no such comment at this time.
Iranian Enrichment	<ul style="list-style-type: none"> A US and Israeli source claimed that Trump has demanded that Iran forgo uranium enrichment completely. 	<ul style="list-style-type: none"> Iranian officials have opposed any new restrictions on their uranium enrichment in recent years, describing it as a "red line."
Highly Enriched Uranium	<ul style="list-style-type: none"> Trump demanded on May 21 that Iran report its highly enriched uranium as a key requirement for a deal. 	<ul style="list-style-type: none"> Supreme Leader Mojibbo Khamenei reportedly prohibited the export of high enriched uranium as part of the deal. Some Iranian sources disputed this claim, however. Iranian state media reported that Iran has made no commitments to report high enriched uranium. Some media reported that the framework did contain no explicit measures regarding the nuclear program.
Lebanon	<ul style="list-style-type: none"> Trump has expressed support for the Israeli desire to retain freedom of action against potential threats, including in Lebanon. 	<ul style="list-style-type: none"> Iranian officials have insisted that the deal must end war on all fronts, including Lebanon. Iran will likely reject any agreement that allows Israeli operations to continue in Lebanon.
Strait of Hormuz	<ul style="list-style-type: none"> Trump specified that the deal includes "keeping the area" but did not elaborate upon whether Iran would exercise sovereignty and have permanent control. Rubio has previously said that the United States will not release Iranian "management" of the strait. 	<ul style="list-style-type: none"> Iranian officials continue to insist that they have sovereignty over the strait and will retain permanent control over it, which could include charging tolls. Iranian officials have expressed openness to negotiating the strait to some commercial traffic, in exchange for the United States ending its blockade of Iran over a 30-day period. Iranian state media has denied that the United States will have permission to interfere with the movement of Iranian ships.
Sanctions and Frozen Funds	<ul style="list-style-type: none"> Trump said that the potential deal would be the "next step" of any that gives economic relief. A US official expressed readiness to give sanctions relief to Iran in exchange for nuclear concessions. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of oil sanctions on Iran.

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What is in the US-Iran "Agreement": Everyone Involved Has a Different Idea

48 minutes on May 24, 2025 at 3:00 PM ET unless otherwise specified. **Position Rehearsed Between May 25, 2024 at 2:00 PM ET and May 26, 2024 at 2:00 PM ET**

	Israel	The Middle East
Is there a deal?	<ul style="list-style-type: none"> Nothing significant to report. 	<ul style="list-style-type: none"> Mediators are attempting to preserve momentum towards an agreement. Talks reportedly failed to move forward with "agreements" issues as part of the framework agreement and postpone discussions on more contentious issues. It is unclear, however, on what issues any party has agreed to.
Lebanon	<ul style="list-style-type: none"> Neheryahu has refused to end Israeli operations in Lebanon. Hezbollah has similarly refused to end operations about a complete Israeli withdrawal, which means that for a successful agreement, Israel must also withdraw from Lebanon. Israeli sources reported that Trump agreed with Neheryahu's position. Israel has reportedly pushed Washington to include language that means Israel can respond to "any threat" in Lebanon. The Iranian rendering of the alleged terms of the framework agreement are at odds with both Israel and Trump's position on Lebanon. 	<ul style="list-style-type: none"> Nothing significant to report.
Strait of Hormuz	<ul style="list-style-type: none"> Israeli officials have expressed opposition to any deal that permits Iran to use the Strait of Hormuz for commerce and determine, thus rejecting Iranian offers to establish permanent control of the strait. 	<ul style="list-style-type: none"> A Palestinian official alleged readiness to "negotiating" the Strait of Hormuz but did not mention whether Iran would exercise sovereignty and have permanent control.
Sanctions and Frozen Funds	<ul style="list-style-type: none"> Israeli officials fear that the deal will allow Iran to recover economically and militarily, which will make a resumption of fighting more difficult. This implies Israel would oppose sanctions relief or the release of frozen funds, given that these would benefit Iran. 	<ul style="list-style-type: none"> Iran wants a deal that includes an unfreezing of 25 billion US dollars in the first phase with a release of the remainder of frozen funds over time, as well as a waiving of oil sanctions on Iran.
Other Nuclear Issues	<ul style="list-style-type: none"> Israeli officials are concerned about the lack of clarity around the US and Iran's second stage of negotiations, during which the two countries would discuss nuclear issues. 	<ul style="list-style-type: none"> Nothing significant to report.
Iranian Enrichment	<ul style="list-style-type: none"> Israeli officials have said during and before this war that Iran must be unable to enrich uranium. 	<ul style="list-style-type: none"> Small media reported on May 23 that Iran offered to suspend uranium enrichment above 3.6 percent for the next decade. This report is unconfirmed, however.

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Iran is also refusing to reopen the Strait of Hormuz and using force to ensure the recognized traffic separation scheme remains closed. Iranian officials continue to state Iran will only re-open the strait to civilian ships under “Iranian arrangements,” and Supreme Leader Mojtaba Khamenei’s guidance to the Iranian government on May 25 said Iran must leverage the strait for economic gain.[10] This position directly contradicts the US position on freedom of navigation, because freedom of navigation through an international waterway has no “arrangements” imposed by another state. Iran has forced vessels to proceed through the strait using its territorial waters and an illegitimate (but unmined) traffic separation scheme by mining the recognized traffic separation scheme (which is in an international waterway) and threatening to fire at any vessel that uses it.

Iran used force again on May 25 to maintain its illegitimate traffic separation scheme when it attempted to deploy mines in the Strait of Hormuz.[11] US Navy aircraft sank the two IRGC Navy vessels responsible for the mine-laying effort. Iran fired at the US Navy aircraft with surface-to-air missiles, but the surface-to-air missile batteries were subsequently struck as well.[12] Iran then separately likely fired an unspecified projectile at and struck the water line of a vessel 60 nautical miles east of Muscat in the Sea of Oman on May 26.[13]

US Central Command (CENTCOM) denied reports that it had resumed Project Freedom and that US forces were escorting vessels through the strait.[14] US President Donald Trump halted the project on May 5 to pursue US-Iran negotiations after announcing the start of it on May 4.[15]





Iranian Supreme Leader Mojtaba Khamenei released a statement on May 26 reaffirming the regime’s commitment to the principles of the Islamic Revolution and his father’s grand strategy - namely, a commitment to the destruction of Israel, the expulsion of US forces from the region, and the formation of a “new Islamic civilization” united against the United States.[16] Khamenei emphasized that “Death to America [and Israel]” will again be the slogan of Iran and the Islamic world.[17] Khamenei stated that Iran defeated US and Israeli forces in the recent war and highlighted the “martyrs” of Iran’s partners and proxies in the region, particularly Hezbollah in Lebanon.[18] Khamenei emphasized the need to unite the Islamic world to “solve the problems” of the region, including preventing the presence of US forces.[19]

Maritime Developments

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

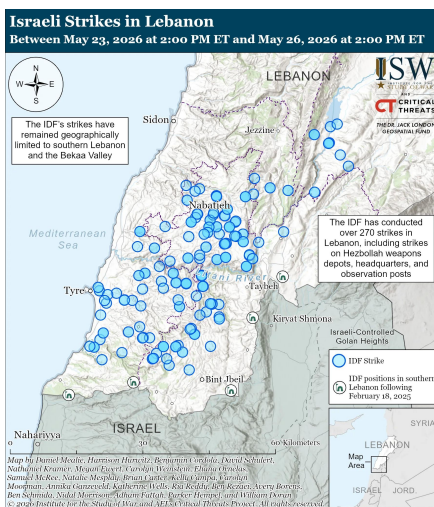
Iranian Internal Dynamics

The Iranian regime has restored some international internet access to Iran, amid growing public discontent with the regime’s economic mismanagement. Iranian President Masoud Pezeshkian ordered the Communications Ministry on May 25 to end the internet shutdown that Iran began in response to the January 2026 protest movement.[20] Internet monitor NetBlocks reported on May 26 that Iran has “partially” restored international internet access and that citizens have gradually increased their internet connectivity.[21] The internet shutdown has exacerbated problems with Iran’s already struggling economy, which has been one of Pezeshkian’s main domestic policy concerns.[22] Pezeshkian has previously emphasized the importance of financial gains from negotiations as necessary for Iran to pay for the estimated \$300 billion USD in losses from the war with the United States and Israel, for example.[23] There are still restrictions on internet access, however. NetBlocks reported that the popular messaging platform WhatsApp is restricted, Iran’s heavily monitored domestic intranet remains active, and that some users are still offline.[24] The Iranian Supreme National Security Council (SNSC) has not yet publicly approved Pezeshkian’s order. Anti-regime media previously reported that the SNSC,

led by hardliner Secretary Mohammad Bagher Zolghadr, expressed concern about the potential for renewed protests due to worsening economic conditions.[25] Internet monitor Filter Watch reported during the internet shutdown in the most recent protest wave that the regime would whitelist select individuals to permit them internet access, rather than allow internet access for all Iranians.[26]

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The IDF has increased its airstrikes and expanded its ground operations against Hezbollah targets in Southern Lebanon and the Bekaa Valley in response to continued Hezbollah attacks against the IDF in southern Lebanon and northern Israel in recent days. Israeli Prime Minister Benjamin Netanyahu said on May 25 that he has told the IDF to increase its operations against Hezbollah.[27] Netanyahu separately stated on May 26 that the IDF is “seizing dominant terrain” and “fortifying” the IDF buffer zone in southern Lebanon to protect northern Israeli communities from Hezbollah attacks.[28] The IDF has conducted over 270 strikes in Lebanon between May 24 and 26.[29] The IDF struck over 100 Hezbollah weapons depots, headquarters, and observation posts in southern Lebanon and the Bekaa Valley overnight between May 25 and May 26, and around 10 command centers and weapons depots in Tyre on May 25.[30] Lebanese media reported at least 100 IDF strikes in Lebanon on May 24, marking the first time the IDF has conducted at least 100 strikes in a 24-hour period since the start of the temporary ceasefire on April 16.[31] The IDF’s strikes have remained geographically limited to southern Lebanon and the Bekaa Valley.[32] ISW-CTP has not observed any reports of strikes in the vicinity of Beirut since the IDF’s targeted strike in Beirut’s southern suburbs on May 6 that killed Hezbollah Radwan Force Commander Ahmad Ghaleb “Malik” Balout.[33]



An Israeli military official and another unspecified source told Reuters on May 26 that it is conducting ground operations beyond the IDF’s “yellow line” in southern Lebanon.[34] The IDF previously deployed the 1st (Golani) Infantry Brigade (36th Division)’s Reconnaissance Unit to establish “operational control” over the area surrounding Zawtar al Chariqyeh, which is located on the edge of the IDF’s “yellow line” on the right bank of the Litani River, on May 12.[35] An Israeli military correspondent reported on May 12 that the 1st Infantry Brigade did not advance beyond the “yellow line” at that time.[36]

Senior Israeli officials have recently called for the IDF to expand its operations, including resuming strikes in Beirut, to counter Hezbollah drone attacks. Israeli media reported that IDF Chief of Staff Lieutenant General Eyal Zamir told the Security Cabinet that the IDF needs to strike buildings in Beirut and Tyre to deter drone attacks.[37] An unnamed senior Israeli official said that Israel has decided to “act more broadly in Lebanon in response to the drones.”[38] An unspecified Israeli official told CNN that the IDF is

pushing to expand its operations against Hezbollah drone infrastructure and renew attacks against Hezbollah leaders in Beirut, but that the plans are awaiting Israeli government approval.[39] US officials have reportedly supported allowing the IDF to conduct targeted strikes against Hezbollah commanders in Beirut.[40] A senior US official told Axios that Israel is not required to passively tolerate continued Hezbollah attacks on IDF forces and Israeli communities.[41] The official noted that Hezbollah has repeatedly ignored requests to halt its attacks on northern Israel, including a recent but unspecified ultimatum.[42] A senior Israeli official said that the United States told Israel not to conduct large attacks in Beirut but authorized Israel to conduct targeted strikes against Hezbollah commanders, including in Beirut.[43]

Hezbollah has continued to conduct attacks against IDF units in southern Lebanon and northern Israel. Hezbollah has repeatedly launched drones at targets in northern Israel throughout the start of the temporary ceasefire on April 16, including at least four waves of drone attacks on May 26, for example.[44] Hezbollah has also consistently attacked IDF forces operating in southern Lebanon with first-person view (FPV) drones, fixed-wing drones, rockets, and mortar fire throughout the ceasefire.[45]

Other Axis of Resistance Activity

Nothing significant to report.

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Iran Update Special Report, May 27, 2026



Ria Reddy, Ben Rezaei, Adham Fattah, Nidal Morrison, Carolyn Moorman, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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

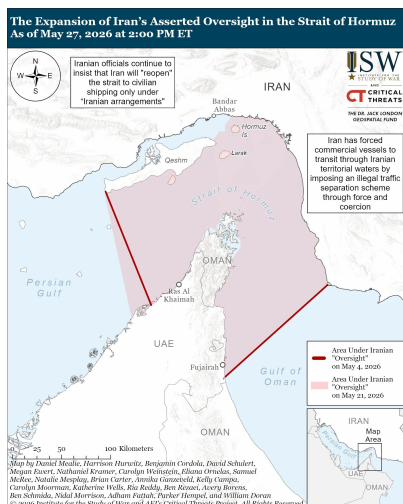
Key Takeaways

1. Senior Iranian officials continue to frame Iranian control over the Strait of Hormuz as a strategic necessity and core element of Iranian deterrence against the United States and Israel.
2. Iranian officials continue to insist that Iran will “reopen” the strait to civilian shipping under “Iranian arrangements.” Any arrangement in which maritime traffic can only pass through Iran’s traffic separation scheme with Iranian approval contradicts the US demand for freedom of navigation, and such an arrangement would significantly undermine US interests and establish a dangerous precedent for the freedom of navigation in international waterways.
3. Conflicting reports about the draft US-Iran agreement, as well as public statements from both sides, highlight continued disagreements on other key issues between the United States and Iran. Iran’s proposed sequencing of concessions would require the United States to surrender key sources of leverage before negotiations over Iran’s nuclear program begin, which would significantly reduce US leverage in any future nuclear negotiations.
4. Iranian media outlet Nour News published an op-ed that emphasized the need for Iran to convert its recent “military victory” into broader political success, which reflects a belief within the regime that Iran emerged from the recent conflict in a position of strength. Iran’s maximalist and uncompromising negotiating positions reflect the Iranian regime’s effort to translate its perceived success in the war into long-term strategic and political gains.
5. An Israeli open-source intelligence analyst posted satellite imagery that shows Iranian reconstitution efforts at the Yazd Missile Base in Yazd Province since the start of the US-Iran ceasefire in April 2026. These reconstitution efforts corroborate ISW-CTP’s assessment that Iran is exploiting the ceasefire period to reconstitute its military capabilities at the tactical and operational levels.

Toplines

Senior Iranian officials continue to frame Iranian control over the Strait of Hormuz as a strategic necessity and core element of Iranian deterrence against the United States and Israel. Supreme Leader Adviser Ali Akbar Velayati described the strait on May 27 as Iran’s “ultimate leverage” and the “real guarantee” of a US-Iran agreement’s “survival.”[1] Velayati’s remarks may reflect the Iranian regime’s belief that Iran’s ability to threaten international shipping and energy markets would make the United States less willing to withdraw from any potential agreement or conduct further military operations against Iran. Velayati’s comments reflect the degree to which senior Iranian leaders are coalescing around the notion of Iranian control over the strait as a key pillar of leverage. His comments are also consistent with ISW-CTP’s assessment that Iran views control of the strait as essential to rebuilding deterrence against the United States and Israel after the degradation of Iran’s other deterrent capabilities, particularly Iran’s ballistic missile capabilities.[2]

Iranian officials continue to insist that Iran will “reopen” the strait to civilian shipping under “Iranian arrangements,” which reflects the broader Iranian effort to institutionalize control over traffic through the waterway and directly contradicts the US demand for freedom of navigation.[3] Iranian media circulated a reported draft US-Iran agreement in which Iran would “restore” shipping through the strait while continuing to manage maritime traffic jointly with Oman.[4] The reported draft proposal also stipulates that military vessels would be barred from transiting through the strait. Iran has not explicitly barred military vessels from passing through the strait in past draft proposals, but Iranian officials and media have repeatedly publicly stated this restriction.[5] The United States rejected the draft proposal in Iranian media as a “complete fabrication,” but the circulation of the proposal in Iranian media nevertheless reflects Iran’s continued effort to secure recognition of its sovereignty over the strait in any agreement with the United States.[6] Iran has used naval mines and attacks on commercial vessels to force vessels to transit through Iran’s illegal and unrecognized traffic separation scheme in Iranian territorial waters, effectively forcing vessels to recognize Iran’s control of the strait.[7] Iranian officials have cited the UN Convention on the Law of the Sea to attempt to justify charging vessels a fee for transiting through Iranian territorial waters.[8] These vessels are not only coerced into using Iran’s traffic separation scheme, but the fees that they pay to Iran are part of an Iranian protection racket in which vessels pay to avoid Iranian attacks.[9] Any arrangement in which maritime traffic can only pass through Iran’s traffic separation scheme with Iranian approval contradicts the US demand for freedom of navigation, and such an arrangement would significantly undermine US interests and establish a dangerous precedent for the freedom of navigation in international waterways. US President Donald Trump emphasized on May 27 the importance of freedom of navigation through the strait and stated that “nobody is going to control” the strait.[10]

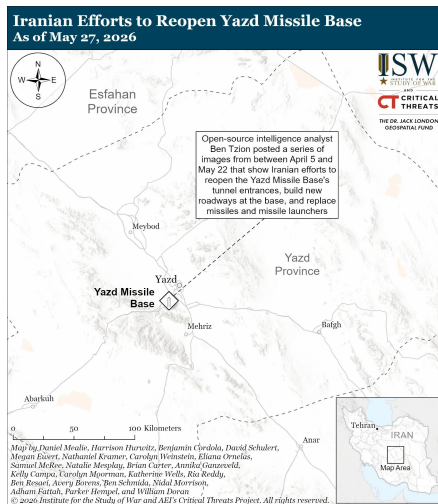


Conflicting reports about the draft US-Iran agreement, as well as public statements from both sides, highlight continued disagreements on other key issues between the United States and Iran. The Iranian media readout of the reported draft proposal stated that Iran would continue to manage traffic through the Strait of Hormuz in exchange for the United States lifting its naval blockade and withdrawing military forces from Iran's vicinity.[11] The readout omitted any reference to Iran's nuclear program, sanctions relief, or frozen assets. Iranian officials have repeatedly demanded that the United States release half of Iran's frozen assets immediately upon signing an agreement and release the remainder within 60 days, however.[12] The Associated Press, citing two regional officials, contrastingly reported that Iran agreed to "give up" its highly enriched uranium (HEU) stockpile.[13] The officials added that negotiators would discuss how Iran would "give up" its HEU stockpile in a 60-day negotiation period following the signing of an initial agreement.[14] A US official reiterated to the Associated Press that the United States will not provide sanctions relief to Iran unless Iran relinquishes its stockpile.[15] Iranian officials, however, continue to demand economic concessions in an initial agreement while postponing nuclear negotiations until a later phase.[16] Supreme National Security Council Deputy Secretary Ali Bagheri Kani reiterated Iran's right to enrich uranium on May 27 and stated that negotiators are not currently discussing Iran's HEU stockpile.[17] Bagheri Kani suggested that the United States and Iran would not be able to reach a preliminary agreement if both sides tried to reach an understanding on nuclear issues because "differences of opinion [are so big]."[18] Iran's proposed sequencing of concessions would require the United States to surrender key sources of leverage before negotiations over Iran's nuclear program begin, which would significantly reduce US leverage in any future nuclear negotiations.

Iranian media outlet Nour News published an op-ed that emphasized the need for Iran to convert its recent "military victory" into broader political success, which reflects a belief within the regime that Iran emerged from the recent conflict in a position of strength.[19] Iran's maximalist and uncompromising negotiating positions reflect the Iranian regime's effort to translate its perceived success in the war into long-term strategic and political gains. The article argued that Iran must pursue "rapid diplomatic exploitation of military gains," which supports ISW-CTP's assessment that Iranian leaders believe they won the conflict and are therefore negotiating from a perceived position of strength.[20] The op-ed called for clear and tangible objectives, including war compensation and guarantees against future attacks, both of which Iranian officials have previously raised as "preconditions" in negotiations.[21] The article also warned that renewed conflict will remain inevitable unless Iran transforms its perceived military success into "sustainable mechanisms." [22] Iran likely views recognition of its control over the Strait of Hormuz as one such mechanism. It is unclear who currently controls Nour News or what the outlet's current affiliation is. Nour News was previously affiliated with former Supreme National Security Council Secretary Ali Shamkhani, but the combined force killed Shamkhani during the recent war.

An Israeli open-source intelligence analyst posted satellite imagery that shows Iranian reconstitution efforts at the Yazd Missile Base in Yazd Province since the start of the US-Iran ceasefire in April 2026.[23] These reconstitution efforts corroborate ISW-CTP's assessment that Iran is exploiting the ceasefire period to reconstitute its military capabilities at the tactical and operational levels.[24] The satellite imagery between April 5 and May 22 reveals Iranian efforts to reopen the base's tunnel entrances, clear rubble and debris, build new roadways, and replace missiles and missile launchers.[25] The combined force struck the Yazd Missile Base at least five times during the conflict, including a strike on March 27 directly after Iranian forces launched missiles from the base.[26] The Iranian Foreign Affairs Ministry spokesperson stated on May 26 that Iran would use any unfrozen assets that Iran secures in a potential US-Iran agreement to further reconstitute and improve Iran's ballistic missile and drone programs.[27] ISW-CTP previously assessed that granting Iran economic relief by unfreezing funds or removing sanctions would likely decrease Iranian military reconstitution

timelines.[28]



Maritime Developments

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

Regime Dynamics in Iran

The Iranian regime appears to be setting conditions to further securitize Iranian society, likely in response to the regime's concerns about US-Israeli "hybrid warfare" tactics and potential internal unrest. The regime defines hybrid warfare as "the use of all domains of power, including information, electronic, cultural, social, and military operations, by hostile actors to destabilize Iran." [29] The Iranian Intelligence Ministry released a statement on May 27 outlining perceived US-Israeli hybrid warfare efforts, including economic pressure, attempts to incite ethnic and religious conflict, border incursions by alleged Israeli-affiliated armed groups, sabotage, and weapons smuggling. [30] The statement accused Farsi-language anti-regime media outlets of inciting political, social, labor, ethnic, and religious unrest. [31] The ministry warned that it will confront any actors who attempt to provoke unrest. [32] The ministry claimed that the United States and Israel's current priority is to incite social unrest around economic grievances. [33] Iranian President Masoud Pezeshkian similarly claimed during a meeting with Tehran's Chamber of Commerce on May 27 that Iran's adversaries have shifted their focus to undermining Iran's economy. [34] Pezeshkian described the economy as the "main battlefield" of the current conflict. [35] These statements are notable given recent anti-media reporting that the Iranian Supreme National Security Council (SNSC) convened an emergency session in late April during which SNSC members discussed the potential for renewed protests triggered by worsening economic conditions. [36]

Iran's Axis of Resistance

Nothing significant to report.

Other Axis of Resistance Activity

Shia National Movement leader Moqtada al Sadr announced on May 27 the dissolution of his Saraya al Salam militia and the “full integration” of the militia’s members into the Iraqi state.[37] Sadr added that civilian entities affiliated with Saraya al Salam will be “transformed” into a non-militia “structure” without bases, weapons, or uniforms.[38] It is unclear whether Saraya al Salam will also cede control of the Popular Mobilization Forces (PMF) brigades it controls, including the 313th, 314th, and 315th brigades.[39] 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.[40] This announcement comes after a senior Iraqi political official told regional media on May 9 that an Iraqi committee comprised of Badr Organization head Hadi al Ameri, Prime Minister-designate Ali al Zaydi, and caretaker Prime Minister Mohammad Shia al Sudani was close to finalizing a plan to disarm Iraqi militias.[41] The United States has pressured the Iraqi federal government to curb Iranian influence in Iraq, including via militia disarmament, since early 2025, but has intensified its efforts in recent months due to repeated militia attacks against US and foreign targets in Iraq and the region during the war.[42]

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Iran Update Special Report, May 28, 2026



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

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Western media reported on May 28 that US and Iranian negotiators have reached a 60-day memorandum of understanding (MoU), but the US and Iranian leaders who must approve the agreement—US President Donald Trump and Iranian Supreme Leader Mojtaba Khamenei, respectively—have not approved the “agreement” at this time. The details of the reported “agreement” are also unclear based on the wording and sourcing of the leaks of the agreement.
2. Even if Iranian negotiators did offer some concessions, it is far from clear that senior decision-makers in Tehran, including Mojtaba Khamenei and IRGC Commander Major General Ahmad Vahidi, are willing to make such concessions. Mojtaba Khamenei's recent public statements indicate that he is not willing to give up Iranian control over the Strait of Hormuz.
3. The IRGC is using force to try to create the reality that Iran controls the Strait of Hormuz. US Central Command's (CENTCOM) recent military strikes against Iran are part of an effort to deny Iran the ability to create that reality.
4. The United States is taking steps to prevent Iranian efforts to establish a protection racket in the Strait of Hormuz. The US Treasury Department sanctioned the Persian Gulf Strait Authority (PGSA) on May 27 and warned that any actor that cooperates with the PGSA could face sanctions.

Toplines

Western media reported on May 28 that US and Iranian negotiators have reached a 60-day memorandum of understanding (MoU), but the US and Iranian leaders who must approve the agreement—US President Donald Trump and Iranian Supreme Leader Mojtaba Khamenei, respectively—have not approved the “agreement” at this time. The details of the reported “agreement” are also unclear based on the wording and sourcing of the leaks of the agreement.[1] Two unspecified US officials told Axios on May 28 that US and Iranian negotiators have

reached a 60-day MoU to extend the ceasefire and launch negotiations on Iran's nuclear program.[2] The officials claimed that Iranian negotiators received the "necessary approvals" from "senior leadership" to sign the deal. Islamic Revolutionary Guards Corps (IRGC)-affiliated Tasnim News Agency, citing a source close to the negotiating team, denied that an MoU has been "finalized," however.[3] An unspecified source also told Israeli media that Mojtaba has not yet approved the "agreement." [4]

The US officials told Axios that Iran would allow "unrestricted" shipping through the Strait of Hormuz, stop imposing tolls and harassing vessels in the strait, and remove naval mines within 30 days, while the United States would lift its naval blockade on Iranian ports.[5] The officials did not specify how the MoU defines "unrestricted" shipping. Iranian officials have repeatedly described the strait as "open" to shipping while forcing vessels to receive Iranian permission to pass through the strait and to use Iran's illegal traffic separation scheme.[6] Iranian officials have also claimed that Iran is charging vessels "protection fees" and "environmental fees" instead of "tolls." [7] The ambiguity around these terms makes it unclear whether Iranian negotiators have actually committed to any concessions in the reported MoU.

Even if Iranian negotiators did offer some concessions, it is far from clear that senior decision-makers in Tehran, including Mojtaba Khamenei and IRGC Commander Major General Ahmad Vahidi, are willing to make such concessions. Mojtaba's recent public statements indicate that he is not willing to give up Iranian control over the Strait of Hormuz.[8] IRGC-affiliated media has also insisted that Iran must receive economic relief—including the release of some of Iran's frozen assets—before Iran will discuss its nuclear program.[9] ISW-CTP continues to assess that Vahidi and his inner circle are currently dominating Iranian decision-making. The US officials told Axios that the United States would discuss sanctions relief and the release of Iran's frozen assets during the 60-day negotiations period, in contrast to the Iranian regime's demand for immediate economic relief upon the signing of an agreement. If Iranian negotiators did agree to postpone the discussion of economic relief to the 60-day negotiations period, this would indicate that Iranian negotiators may not be aligned with Mojtaba and Vahidi. Anti-regime media, citing a source close to the negotiations, reported on May 28 that there are doubts among unspecified individuals about Iranian Parliament Speaker Mohammad Bagher Ghalibaf and the negotiating team's coordination with Mojtaba, which further suggests that the terms in the reported US-Iran MoU may not reflect the positions of key Iranian leaders in Tehran.[10]

The IRGC is using force to try to create the reality that Iran controls the Strait of Hormuz. US Central Command's (CENTCOM) recent military strikes against Iran are part of an effort to deny Iran the ability to create such a reality. Iranian state media claimed on May 28 that the IRGC Navy issued a "stern warning" to four vessels that attempted to pass through the Strait of Hormuz without Iranian permission.[11] The report claimed that the IRGC Navy seized two of the vessels and forced the other two vessels to turn around.[12] US CENTCOM reported on May 28 that US forces intercepted five Iranian one-way attack drones that threatened US forces and commercial shipping in the strait.[13] CENTCOM added that US forces struck an Iranian drone launch site in Bandar Abbas, Hormozgan Province, that was preparing to launch a sixth drone.[14] It is possible that the Iranian drones were targeting the vessels that Iranian media claimed attempted to transit through the strait without coordinating with Iran. Iran has repeatedly used force, including attacks on commercial vessels and naval mines, to force vessels to transit through its illegal traffic separation scheme and comply with Iranian transit regulations. US forces recently struck two IRGC Navy mine-laying vessels on May 25. Iran responded to the US strikes by launching a ballistic missile at an unspecified US airbase in Kuwait, but Kuwaiti air defenses intercepted the missile.

ISW-CTP is tracking initial IRGC-affiliated media reporting of Iranian missile attacks launched from southern Iran targeting US naval vessels in an unspecified location in the Persian Gulf

as of 3:58 PM ET on May 28.[15] ISW-CTP will provide further analysis about these reports on May 29.



The United States is taking steps to prevent Iranian efforts to establish a protection racket in the Strait of Hormuz. The US Treasury Department sanctioned the Persian Gulf Strait Authority (PGSA) on May 27 and warned that any actor that cooperates with the PGSA could face sanctions.[16] The PGSA is an organization that Iran established to formalize its control over the strait and force commercial vessels to pay tolls and coordinate their movements with Iran.[17] US Treasury Secretary Scott Bessent also threatened to economically target any actors, including Oman, that directly or indirectly facilitate tolls in the strait.[18] Bessent's comments follow multiple reports that Iran has discussed establishing a system with Oman to jointly collect tolls from vessels that transit through the strait.[19]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

See topline section.

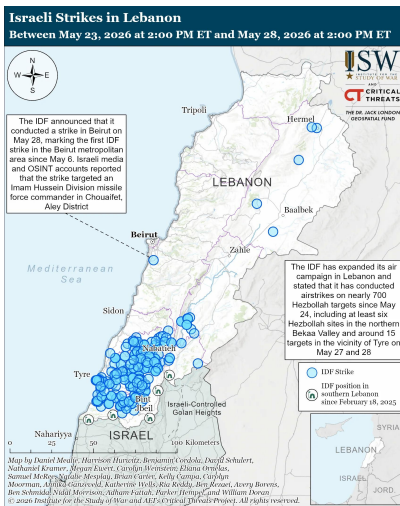
Regime Dynamics in Iran

The Iranian Parliament re-elected Mohammad Bagher Ghalibaf as parliament speaker for his seventh consecutive term in the Iranian Parliament's annual presidium election on May 25.[20] It is very rare, if not unprecedented, for parliamentarians to oust the incumbent parliament speaker during the annual presidium election, and it would have therefore been noteworthy if parliamentarians had voted to remove Ghalibaf. Ghalibaf's removal would have been particularly notable given the role he has played in leading Iran's negotiating delegation in recent months. Ghalibaf won 235 votes from the 285 parliamentarians who voted. The other two candidates for parliament speaker were ultraconservative Paydari (Stability) Front candidate Mohammad Taghi Naghdali and Sunni candidate Osman Salari, who received 29 and seven votes, respectively.[21] Parliament also re-elected Ali Nikzad and Hamid Reza Haji Babaei as deputy parliament speakers.[22] Ghalibaf has served as parliament speaker since 2020, before which Ali Larijani held the position for 12 years.[23]

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) conducted a strike in Beirut's vicinity for the first time since May 6, after the IDF reportedly received US approval to target Hezbollah-affiliated commanders in the area.[24] The IDF announced that it conducted a strike in Beirut on May 28.[25] Israeli media and open-source intelligence (OSINT) accounts reported that the strike targeted Imam Hussein Division Missile Force Commander Ali al Hussein in Chouaifet, Aley District, which is located in Beirut's metropolitan area.[26] The IDF has not confirmed that its strike targeted Hussein at the time of this writing, however. The IRGC Quds Force uses the Imam Hussein Division to conduct attacks against the IDF and Israel.[27] The IDF struck and killed former Imam Hussein Division Commander Hassan Ali Marwan in Beirut on March 17.[28] The IDF strike in Chouaifet marks the first IDF strike in Beirut's vicinity since the IDF killed Hezbollah Radwan Force Commander Ahmad Ghaleb "Malik" Balout in Beirut's southern suburbs on May 6.[29] The IDF's strike follows recent reports that US officials support allowing the IDF to target Hezbollah commanders in Beirut.[30] A senior Israeli official told Israeli media on May 26 that the United States told Israel not to conduct large attacks in Beirut but authorized Israel to conduct targeted strikes against Hezbollah commanders.[31]



The IDF has expanded its ground and air campaigns in Lebanon in recent days and has made limited advances beyond the “Yellow Line.”[32]

The IDF confirmed on May 28 that it has conducted “raids” beyond the “Yellow Line” to push Hezbollah fighters deeper into Lebanon and protect Israeli forces in southern Lebanon and northern Israel from Hezbollah first-person view (FPV) drone attacks.[33] Israeli Prime Minister Benjamin Netanyahu said on May 26 that the IDF will seize “strategic positions” during expanded ground operations and confirmed on May 28 that Israeli forces have advanced north of the Litani River.[34] An OSINT analyst posted satellite imagery on May 28 showing several IDF tanks positioned north of the Litani River in Yohmor, Nabatieh District.[35] The analyst previously posted imagery on May 26 showing IDF tanks in nearby Zawtar al Charqiyeh, Nabatieh District, which was the IDF’s bridgehead for ground operations north of the Litani.[36] Hezbollah claimed on May 27 that it used direct fire on Israeli forces in Zawtar al Charqiyeh, which Hezbollah has typically avoided except for the group’s recent attempts to defend against Israeli ground advances.[37] The IDF has also expanded its air campaign in Lebanon and claimed that it has struck nearly 700 Hezbollah targets since May 24.[38] The IDF struck at least six Hezbollah sites in the northern Beqaa Valley, in addition to striking around 15 targets in the vicinity of Tyre on May 27 and 28.[39] The IDF also issued an order on May 27 for civilians to evacuate all Lebanese territory south of the Zahrani River for the first time and declared all territory south of the river a “combat zone.”[40]

Other Axis of Resistance Activity

Nothing significant to report.



Endnotes

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Iran Update Special Report, May 29, 2026



Adham Fattah, Ben Rezaei, Benjamin Schmida, Kelly Campa, Katherine Wells, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. US President Donald Trump called for the Strait of Hormuz to “immediately open” without tolls and with the removal of mines. Iran has, in recent days, used force to try to create the reality that Iran controls the Strait of Hormuz. Iran’s demands for “control” of the Strait of Hormuz directly contradict Trump’s position. These Iranian demands would be a fundamental change to long-held international maritime law and are at odds with the free flow of commerce.
2. US Central Command has continued to respond to Iranian efforts to use force to create the reality that Iran controls the Strait of Hormuz, most recently by issuing a notice to mariners and airmen on May 29 that the US Navy will conduct military operations north of the Musandam Peninsula in the Strait of Hormuz.
3. Iranian officials continue to indicate that Iran will not accept or make concessions on US President Donald Trump’s most recent demands regarding Iran’s nuclear program, which include not producing a nuclear weapon and agreeing to “destroy” or move its highly enriched uranium (HEU) stockpile.
4. The US Treasury Department has sanctioned five front companies supporting the Iranian Armed Forces General Staff-controlled Sepehr Energy Jahan Nama Pars Company on May 28, for facilitating Iranian oil shipments, including exports to the People’s Republic of China.
5. US Central Command (CENTCOM) denied Iranian claims that Iranian air defense systems downed US aircraft near Bushehr Province in southern Iran on May 28.
6. Saudi officials complained to the United States in early April that the UAE’s involvement in US-Israeli airstrikes on Iran increased the risk that Iran would target regional energy facilities, according to the *Wall Street Journal*. It is unclear on which day the UAE strikes began, based on this reporting, but Iran first struck Gulf energy infrastructure on March 1, when it hit a structure at Jabel Ali Port’s oil terminal in Dubai, UAE, and Ras Tanura Refinery in Dhahran, Saudi Arabia.
7. Hezbollah has adapted to increasing IDF night operations by fielding thermal camera-equipped first-person view (FPV) drones that enable nighttime attacks, after the IDF began nighttime operations to make it harder for Hezbollah to launch FPV drone attacks on them. Hezbollah,

subsequently, appears to be dictating the pace of adaptation to the IDF at this time by quickly overcoming relatively rudimentary Israeli countermeasures.

Toplines

US President Donald Trump called for the Strait of Hormuz to “immediately open” without tolls and with the removal of mines. Iran’s demands for “control” of the Strait of Hormuz directly contradict Trump’s position. These Iranian demands would be a fundamental change to long-held international maritime law and are at odds with the free flow of commerce. Trump stated on Truth Social that Iran must “immediately open” the strait with no tolls and remove remaining mines.[1] Trump’s definition of an “open” strait is different from Iranian officials’, however. Trump’s statement refers to the pre-war version of the strait – one in which international shipping was unencumbered by Iranian threats to fire at ships or mine waterways and Iranian efforts to disrupt shipping by moving traffic separation schemes and charging tolls on transiting vessels. Iranian officials and media continue to state that an “open” strait is one in which the IRGC Navy escorts vessels through an unrecognized traffic separation scheme in Iranian territorial waters, whether vessels pay a toll or not. Iranian Foreign Affairs Ministry spokesperson Esmail Baghaei stated on May 29 that the strait has been and will continue to be under Iran’s “special measures,” including the blockage of commercial vessels that Iran deems “hostile” through coordination with Iranian authorities.[2] Parliament’s National Security and Foreign Policy Committee Chairman Ebrahim Azizi also stated on May 29 that Iran will pursue “management of the Strait of Hormuz” permanently.[3] IRGC-affiliated outlet Fars News Agency reported on May 29 that Iran is preparing for arrangements to monitor ships, provide services, and ensure security in the strait.[4] All of these positions are at odds with the free flow of commerce on the ocean. The regime’s English-media outlet Press TV argued on May 29 that the Iran’s sovereignty over the strait is “non-negotiable” and represents a vital strategic tool for Iran to deter future US military action against Iran.[5]

Iran can try to establish its unrecognized traffic separation scheme for the Strait of Hormuz either by obtaining US and then International Maritime Organization (IMO) recognition of its traffic separation scheme or, failing that, by force. The IMO recognizes traffic separation schemes, which are governed by the 1972 Convention on the International Regulations for Preventing Collisions at Sea (COLREGS).[6] President Trump’s statement opposes the recognition of Iran’s traffic separation scheme.[7] This means that Iran would need to fire at or otherwise threaten ships in the strait in order to enforce its rules if Iran agreed to Trump’s demands. Iran has repeatedly used force, including attacks on commercial vessels and naval mines, to force vessels to transit through its illegal traffic separation scheme and comply with Iranian transit regulations since March 4.[8] US efforts to blockade Iranian ships and ports and US strikes against Iran are part of an effort to prevent Iran from enforcing the coercive actions.

The IRGC is using force to try to create the reality that Iran controls the Strait of Hormuz. US Central Command (CENTCOM) has continued to respond to Iranian efforts, most recently by issuing a notice to mariners and airmen on May 29 that the US Navy will conduct military operations north of the Musandam Peninsula in the Strait of Hormuz.[9] The US Navy will target any vessels “engaged in, or supporting, mine-laying activities.”[10] The notice added that Iran continues to attempt to impede safe navigation and mine clearance in the strait.[11]

Iranian officials continue to indicate that Iran will not accept US President Donald Trump’s most recent demands regarding Iran’s nuclear program. Trump stated on Truth Social on May 29 that Iran must commit to not producing a nuclear weapon and agree to “destroy” or move its highly enriched uranium (HEU) stockpile.[12] Iranian officials have indicated that Iran will not agree to these demands and therefore have refused to make concessions, however.[13] Iranian Parliament’s National

Security and Foreign Policy Committee Chairman Ebrahim Azizi stated on May 29 that Iran does not intend to transfer its enriched uranium stockpile to a third country.[14] The committee's spokesperson Ebrahim Rezaei also stated that Iran opposes suspending uranium enrichment or moving its HEU from Iranian territory because Iran is "victorious" and should make "maximum demands" of the United States.[15] Hardliner Parliamentarian and member of the Iranian negotiating team Mahmoud Nabavian stated on May 29 that Iran has the right to conduct nuclear research, development, and production without the interference of the United States, because it is a member of the Non-Proliferation of Nuclear Weapons (NPT) agreement.[16] Islamic Revolutionary Guards Corps (IRGC)-affiliated Tasnim News Agency also denied Western media reports on May 29 that Iran and the United States had agreed to a 60-day memorandum of understanding (MoU), adding that the sides did not reach a final agreement and that there was no discussion of Iran's nuclear program. Tasnim added that Iran has "repeatedly emphasized" that Iran will not accept any agreement until the United States has "clarified" the status of Iranian frozen assets.[17]

The United States is continuing to apply economic pressure on Iran by targeting the networks that facilitate its illicit oil trade. The Iranian regime heavily relies on the oil trade to generate revenue.[18] The US Treasury Department sanctioned five front companies supporting the Iranian Armed Forces General Staff-controlled Sepehr Energy Jahan Nama Pars Company on May 28, for facilitating Iranian oil shipments, including exports to the People's Republic of China.[19] The US State Department also sanctioned three entities and an individual linked to Iran's petrochemical products trade and designated eight entities and eight vessels as blocked property for transporting Iranian petroleum or petrochemical products on May 28.[20]

CENTCOM denied Iranian claims that Iranian air defense systems downed US aircraft near Bushehr Province in southern Iran on May 28.[21] CENTCOM confirmed that all US air assets are accounted for. IRGC-affiliated media claimed that it intercepted a "hostile aircraft" over the Persian Gulf near Jam City, Bushehr Province, on May 28.[22]

The Wall Street Journal reported on May 29 that the United Arab Emirates (UAE) conducted dozens of airstrikes targeting Iran in coordination with the United States and Israel during the US-Israeli air campaign.[23] *The Wall Street Journal* added that Saudi officials complained to the United States in early April that UAE strikes increased the risk that Iran would target regional energy facilities.[24] Unspecified people familiar with the matter told the *Wall Street Journal* that the UAE began strikes in the "early days" of the war and continued them through the day after the April ceasefire announcement.[25] It is unclear on which day the UAE strikes began based on this reporting, but Iran first struck Gulf energy infrastructure on March 1, when it hit a structure at Jabel Ali Port's oil terminal in Dubai, UAE, and Ras Tanura Refinery in Dhahran, Saudi Arabia.[26] This means that for Iran's first attacks on energy to have been in retaliation for UAE strikes, the UAE would have had to take part in the air campaign beginning on February 28 or early on March 1. Iran also targeted the UAE with 346 projectiles on February 28, which was the first day of the war.[27]

Hezbollah has adapted to increasing IDF night operations by fielding thermal camera-equipped first-person view (FPV) drones that enable nighttime attacks. The IDF initially began conducting more operations at night due to the risks of FPV attacks during the day. Hezbollah published a video of a thermal camera-equipped FPV drone that struck and wounded two IDF soldiers near Iskandarounah in southern Lebanon at night on May 23.[28] Hezbollah has increased nighttime drone attacks, according to an IDF soldier speaking to the *Wall Street Journal*. Hezbollah's thus far limited deployment of thermal camera-equipped FPV drones is likely an adaptation to IDF night operations, as many Israeli units in Lebanon have begun to operate at night to avoid the daytime threat posed by FPVs.[29] This new capability will force the IDF to further adapt to Hezbollah's nascent

nighttime FPV drone capabilities as well as to continue to combat daytime FPV drone attacks. The soldier who spoke to the *Wall Street Journal* warned that the IDF currently does not have a solution to Hezbollah's adaptation "beyond covering weapons and equipment with [anti-drone] nets." [30]

Hezbollah appears to be dictating the pace of adaptation to the IDF at this time by quickly overcoming relatively rudimentary Israeli countermeasures. Israeli media observed in early April 2026 that Hezbollah was "increasingly" deploying fiber-optic drones, which suggests that Hezbollah began the war relatively more reliant on radio-controlled drones. [31] The increasing Hezbollah reliance on fiber optic drones also indicates that Israeli electronic countermeasures may have pressured Hezbollah to begin using fiber-optic drones. Hezbollah, without the Israeli employment of electronic warfare, would have no reason to shift to fiber-optic drones. The IDF has adapted to fiber optic drones through a series of rudimentary passive defenses, none of which are particularly effective as presently implemented by tactical units. [32] Hezbollah published FPV footage from May 15, for example, that shows an IDF position where IDF soldiers deployed nets over top but not around their vehicles, making it easy for the drones to fly under the nets and detonate. [33] The drones also forced the IDF to operate increasingly at night, but the emergence of drones equipped with thermal cameras will also negate that IDF countermeasure. [34]

US-Iran Negotiations

Nothing significant to report.

Maritime Activity in the Strait of Hormuz and Persian Gulf

Nothing significant to report.

US and Israeli Air Campaign

Iran has continued to use the ceasefire to reconstitute its ballistic missile force by restoring access to missiles and launchers buried in underground missile bases. The US-Israeli air campaign blocked the entrances to many underground bases to prevent missile crews from firing, but CNN reported on May 27 that satellite imagery shows that Iran has excavated at least 50 of 69 tunnel accesses at 18 underground missile bases. [35] Iran has used construction equipment to reopen the entrances and restore access roads. [36] Excavating these bases is part of a wider effort to reconstitute tactical units in the ballistic missile force and make them combat effective again. Other reconstitution activities—like reorganization of operational-level commands and regeneration of logistics networks, for example—need to take place for the units to be capable of executing their mission of massing and sustaining fire against US and Israeli targets. [37]

ISW-CTP continues to assess that Iran's ability to regain access to missiles and launchers stored in underground bases and restore some capacity to fire missiles does not mean that Iran has reconstituted its broader ballistic missile program, however. US-Israeli airstrike campaign aimed to generate qualitative effects across Iran's entire missile program (not just the operational force), including the assets that sustain it.

Iranian Domestic Affairs

Likely anti-regime militant fighters killed one Iranian Law Enforcement Command (LEC) member in an armed attack in southeastern Iran on May 28. IRGC-affiliated Tasnim reported on May 28 that unspecified armed individuals shot and killed an LEC officer in Iranshahr, Sistan and Baluchistan Province.[38] No group has claimed responsibility for the attack at the time of this writing. The attack is consistent with long-running anti-regime militant activity targeting security forces and institutions in southeastern Iran.[39]

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Israeli and Lebanese military officials discussed Lebanon's efforts to disarm Hezbollah in a round of security talks at the Pentagon on May 29.[40] These talks are the first direct military talks between Lebanon and Israel since 1993.[41] Israeli and Lebanese diplomatic officials have met at least three times in Washington, DC, over the past two months to discuss an end to the Israel-Hezbollah conflict.[42] Diplomatic officials are set to meet at the US State Department on June 2 and 3 to continue talks.[43]

Other Axis of Resistance Activity

Nothing significant to report.

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Iran Update Special Report, May 30, 2026



Ben Rezaei, Adham Fattah, Benjamin Schmida, Katherine Wells, 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. Iran continues to try to frame the Islamic Revolutionary Guards Corps (IRGC) “management” of transit through the Strait of Hormuz as the new status quo. The United States and international community must continue to reject Iranian efforts to try to establish this new status quo, as it is detrimental to international commercial interests and sets a dangerous precedent for freedom of navigation in international waterways.
2. Neither the United States nor Iran has indicated that the two sides have narrowed gaps on key issues in the US-Iran negotiations, such as economic relief for Iran. Iran likely seeks unrestricted access to its frozen assets to reduce the effect of US sanctions and the naval blockade and support its military reconstitution.
3. The hardline faction within the Iranian regime is not a monolith but contains a spectrum of actors with varying priorities, opinions, and political positions. ISW-CTP continues to assess that hardline IRGC officials, particularly IRGC Commander Major General Ahmad Vahidi and his inner circle, are unwilling to make meaningful concessions in negotiations with the United States.
4. Iran may have used a Chinese-made man-portable air defense system (MANPADS) to target US aircraft during the war, according to three individuals familiar with the matter speaking to Western media.

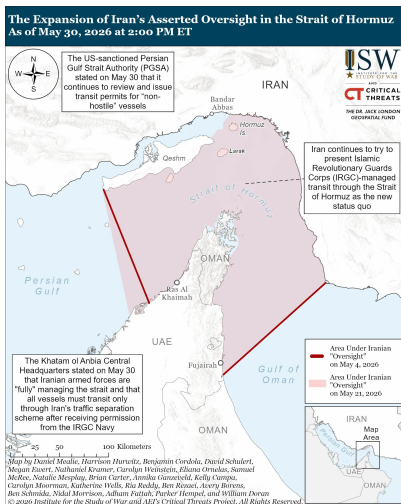
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Iran continues to try to frame the Islamic Revolutionary Guards Corps (IRGC) “management” of transit through the Strait of Hormuz as the new status quo. The United States and international community must continue to reject Iranian efforts to try to establish this new status quo, as it is detrimental to international commercial interests and sets a dangerous precedent for freedom of navigation in international waterways. The IRGC Navy has begun

publishing daily roll-ups of the number of vessels that use Iran's illegal traffic separation scheme. The IRGC Navy reported that 20 vessels passed through Iran's traffic separation scheme on May 30.[1] Iran has repeatedly used force, including attacks on commercial vessels and naval mines, to force vessels to use Iran's illegal and unrecognized traffic separation scheme. The IRGC Navy also claimed that it provided "safe passage" to some vessels for "humanitarian reasons," likely to try to portray the IRGC Navy as a reasonable actor despite its deployment of mines, as well as attacks and harassment of vessels in the Strait of Hormuz. The Khatam ol Anbia Central Headquarters separately stated on May 30 that Iranian armed forces are "fully" managing the strait and that all vessels must transit only through Iran's traffic separation scheme after receiving permission from the IRGC Navy.[2] The headquarters warned that Iranian armed forces will target any military vessel that intervenes in Iran's management of the strait or disrupts maritime traffic, likely in response to a May 29 US CENTCOM notice that the US Navy will conduct military operations north of the Musandam Peninsula in the Strait of Hormuz and target vessels "engaged in, or supporting, mine-laying activities." [3]

Neither the United States nor Iran has indicated that the two sides have narrowed gaps on key issues in the US-Iran negotiations, such as economic relief for Iran.[4] An unspecified senior Trump administration official told the *New York Times* on May 29 that the Trump administration believes it is close to an agreement but that the United States and Iran have still not resolved certain issues, including the unfreezing of Iranian assets.[5] Trump announced that "no money will be exchanged" in a social media post on May 29, likely referring to frozen Iranian assets.[6] Iranian officials have repeatedly demanded the release of frozen assets as a "precondition" for talks about nuclear issues.[7] An Iranian negotiating team member close to Parliament Speaker Mohammad Bagher Ghalibaf asserted on May 30 that Iran's "irreversible" access to \$12 billion USD in frozen assets is one of Iran's "main" conditions for any possible agreement.[8] Iranian state media, citing "unofficial details of a possible US-Iran memorandum of understanding," separately claimed that the United States would give Iran full access to \$12 billion USD in frozen assets within 60 days.[9] Ghalibaf recently led an Iranian delegation to Qatar to try to secure the "immediate" and "unconditional" release of \$12 billion USD, but Qatar rejected Iran's request, according to anti-regime media on May 29.[10]

Iran likely seeks unrestricted access to its frozen assets to reduce the effect of US sanctions and the naval blockade and support its military reconstitution. US sanctions and the naval blockade have hindered Iran's ability to raise revenue that the regime could use to reconstitute its military capabilities.[11] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on May 25 that assets released under a potential agreement with the United States would go toward Iran's defense and military sectors, including Iran's missile and drone programs.[12] ISW-CTP previously assessed that granting Iran economic relief by unfreezing funds or removing sanctions would likely decrease Iranian military reconstitution timelines.



The hardline faction within the Iranian regime is not a monolith but contains a spectrum of actors with varying priorities, opinions, and political positions. ISW-CTP continues to assess that hardline IRGC officials, particularly IRGC Commander Major General Ahmad Vahidi and his inner circle, are unwilling to make meaningful concessions in negotiations with the United States. Analysts close to the Iranian regime told the *New York Times* on May 29 that hardliners, whom they claimed represent a “minority view,” are attempting to derail negotiations.[13] The hardliners in this report likely specifically refer to ultrahardliners affiliated with the Paydari (Stability) Front. Two unspecified senior Iranian officials told the *New York Times* that Supreme National Security Council (SNSC) Deputy Secretary Ali Bagheri Kani criticized Iran’s negotiating team for being “too conciliatory” during the first round of US-Iran negotiations in Islamabad in April.[14] Bagheri Kani has close ties to Paydari (Stability) Front leader Saeed Jalili.[15] The Paydari (Stability) Front represents only one element of the hardline faction, and other, non-Paydari (Stability) Front hardliners have also posed an obstacle to negotiations by refusing to make concessions and insisting on maximalist demands. Vahidi and his inner circle, whom ISW-CTP assesses are currently dominating regime decision-making, have not signaled any willingness to soften their maximalist demands in negotiations, for example. The hardline faction in the regime also includes some “pragmatist” officials, such as Mohammad Bagher Ghalibaf, who leads Iran’s negotiating delegation. ISW-CTP previously assessed that Ghalibaf may not be aligned with key decision-makers in Tehran, such as Vahidi, and may be more willing to make concessions in negotiations.

Iran may have used a Chinese-made man-portable air defense system (MANPADS) to target US aircraft during the war, according to three individuals familiar with the matter speaking to Western media. The three individuals told NBC News on May 29 that Iran “probably” struck the US F-15 fighter jet over southwestern Iran on April 3 using a Chinese-made shoulder-launched missile.[16] Iran was reportedly in discussions with the People’s Republic of China (PRC) before the war began in late February 2026 to acquire MANPADS.[17] The PRC may have also provided Iran with a radar system to bolster its integrated air defense system before the war.[18] One of the sources and a US official told NBC News that the PRC may have given Iran a YLC-8B long-range anti-stealth surveillance radar in the “early days of the war.”[19]

The possible PRC military transfers underscore the nature of the PRC’s military partnership with Iran. The PRC has demonstrated a willingness to bolster Iran’s military capabilities without risking direct entanglement in the conflict and is one of the few technologically advanced countries that appears willing to sell military equipment to Iran. The PRC reportedly sold Iran an advanced reconnaissance satellite that Iran used to target US military bases across the region during the war, for example.[20] The PRC is also a key partner helping Iran reconstitute its missile program and has continued this support by sending Iran missile fuel precursor during the conflict.[21]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

US Central Command (CENTCOM) continues to enforce its naval blockade against Iranian ports. US forces disabled the Gambia-flagged M/V *Lian Star* by firing at its engine room as the vessel attempted to run the blockade on May 29. CENTCOM said it issued numerous warnings to the vessel before firing. US forces have disabled five vessels and redirected 116 vessels since initiating the blockade on April 13.[22] US CENTCOM noted in a May 30 notice to mariners that ships that aid Iranian efforts to violate the blockade, such as conducting ship-to-ship transfers with Iranian vessels, are also in violation of the blockade.[23]

US and Israeli Air Campaign

See topline section.

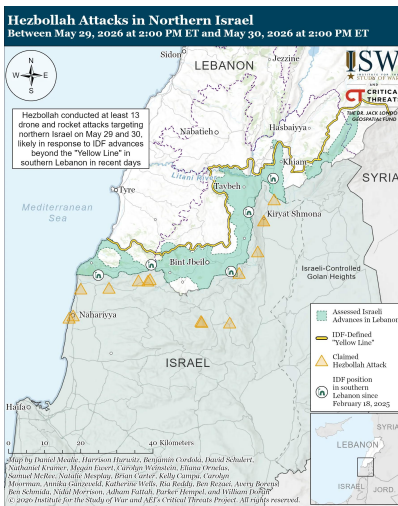
Iranian Domestic Affairs

The Iranian regime continues to face threats from Kurdish anti-regime groups in northwestern Iran. Law Enforcement Command (LEC) Border Guard Commander Brigadier General Ali Akbar Javidan announced on May 29 that a likely Kurdish opposition group attacked a border guard unit in Chalدران County, West Azerbaijan Province, near Iran's northwestern border.[24] IRGC forces also killed two Kurdistan Freedom Party (PAK) members in Kermanshah Province on May 28.[25] The regime has historically accused Kurdish armed groups of inciting anti-regime unrest in Iran. The regime previously accused Kurdish opposition groups of inciting protests in Kurdish areas during the Mahsa Amini movement, for example.[26] The regime has also historically accused Kurdish opposition groups and Israel of using Iraqi Kurdistan to facilitate operations in Iran.[27]

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Hezbollah attacked Israel Defense Forces (IDF) positions and communities in northern Israel with drones and rockets on May 29 and 30, likely in response to recent IDF advances in southern Lebanon. Hezbollah claimed that it has conducted at least 13 drone and rocket attacks targeting northern Israel since ISW-CTP's last data cutoff, including attacks targeting the northern Israeli towns of Safed, Kiryat Shmona, and Nahariya.[28] Hezbollah fired over 30 rockets in the attacks, some of which struck the commercial center of Kiryat Shmona and landed off the coast of Nahariya on May 30.[29] A Hezbollah drone also struck a military area near Shomera on May 30.[30] Israeli media reported that the Hezbollah attacks did not cause any casualties.[31]



Hezbollah likely launched attacks on northern Israel in response to IDF advances beyond the “Yellow Line” in southern Lebanon in recent days. The IDF 36th Division crossed the Litani River on May 29 to remove the threat of anti-tank fire to the Galilee Panhandle, according to an Israeli Army Radio correspondent.[32] A Lebanese open-source intelligence (OSINT) analyst and Lebanese media reported that the IDF advanced into western Yohmor, Nabatieh District, on May 28, citing satellite imagery of IDF armored vehicles.[33] Israeli forces reportedly advanced south of Dibbine, Marjaayoun District, on May 29, and into Ghandouriyeh, Bint Jbeil District, on May 30.[34] Hezbollah claimed that it conducted a complex improvised explosive device (IED) ambush on IDF forces in Ghandouriyeh on May 30, in which the group fired mortars and rockets at Israeli forces after detonating the IED.[35] The attack may support the analyst’s claim that the IDF advanced into the town.[36] A Hezbollah-aligned journalist also reported that Hezbollah engaged the IDF in Ghandouriyeh on May 30.[37]

Other Axis of Resistance Activity

Nothing significant to report.



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