

Iran Update Special Report, May 31, 2026



Parker Hempel, Benjamin Schmida, William Doran, Nidal Morrison, Avery Borens, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and 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 has requested several amendments to the draft US-Iran memorandum of understanding (MoU) as the United States and Iran remain at odds over key issues. Officials said that Trump specifically requested amendments to the draft's text about how and when the United States would secure Iran's highly enriched uranium (HEU). A second informed source told Axios that Trump also requested changes to the draft MoU's text on the Strait of Hormuz. Three US officials separately told the New York Times on May 30 that Trump is concerned about parts of the draft MoU that would involve the United States unfreezing Iranian funds. Islamic Revolutionary Guards Corps (IRGC)-affiliated media argued that it would be better to not reach an agreement than for Iran to accept a "bad deal" that failed to secure Iranian interests.
2. Anti-regime media, citing an unspecified informed source, claimed on May 31 that President Masoud Pezeshkian has submitted a resignation letter to Supreme Leader Mojtaba Khamenei. ISW-CTP cannot independently verify this report. Iranian state media denied this report and no Iranian officials have confirmed this claim at the time of this writing.

Toplines

US President Donald Trump has requested several amendments to the draft US-Iran memorandum of understanding (MoU) as the United States and Iran remain at odds over key issues. A senior Trump administration official and a second unspecified source told Axios on May 30 that Trump requested several amendments to the draft MoU.[1] The officials said that Trump specifically requested amendments to the draft's text about how and when the United States would secure Iran's highly enriched uranium (HEU).[2] The current draft MoU states that Iran would commit to not pursue a nuclear weapon but does not contain any Iranian commitments to hand over Iran's HEU or halt enrichment.[3] The current draft states that the United States and Iran would discuss nuclear issues

during a 60-day period after the parties sign the MoU.[4] Iranian officials have repeatedly insisted that Iran will not suspend uranium enrichment or transfer its HEU from Iran.[5]

A second informed source told Axios that Trump also requested changes to the draft MoU's text on the Strait of Hormuz.[6] The source did not specify what specific changes Trump requested, however.[7] Trump previously called on Iran on May 29 to "immediately open" the Strait of Hormuz without tolls and to remove mines from the strait.[8] The United States and Iran have different definitions of "opening" the strait, however.[9] Iranian officials and media continue to claim that the strait is "open" despite the Islamic Revolutionary Guards Corps (IRGC) Navy forcing vessels to transit through Iran's illegal traffic separation scheme.[10] Two unspecified US officials told Axios on May 28 that, under the current draft MoU, 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.[11] Iranian officials have also claimed that Iran is charging vessels "protection fees" and "environmental fees" instead of "tolls." [12] 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.

Three US officials separately told the *New York Times* on May 30 that Trump is concerned about parts of the draft MoU that would involve the United States unfreezing Iranian funds.[13] Trump previously appeared to reject unfreezing Iranian funds on May 29, stating that "no money will be exchanged until further notice." [14] Iranian officials have repeatedly stated that the United States must unfreeze frozen Iranian assets in order for Iran to accept any potential agreement.[15] An Iranian official affiliated with Iran's negotiating delegation stated on May 30 that Iran could withdraw from a US-Iran agreement if the United States "does not meet its commitments," including unfreezing Iranian funds.[16]

Unspecified informed sources told Israeli media that Iranian Supreme Leader Mojtaba Khamenei has not responded to either the current draft MoU or Trump's proposed amendments.[17] IRGC-affiliated media argued that it would be better to not reach an agreement than for Iran to accept a "bad deal" that fails to secure Iranian interests.[18]

Anti-regime media, citing an unspecified informed source, claimed on May 31 that President Masoud Pezeshkian has submitted a resignation letter to Supreme Leader Mojtaba Khamenei.[19] Pezeshkian reportedly warned in an "unprecedented and critical tone" that the IRGC is wielding an outsized role in the regime.[20] ISW-CTP cannot independently verify this report. Iranian state media denied this report and no Iranian officials have confirmed this claim at the time of this writing.[21]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

Iran continues to use the Caspian Sea and overland transit routes to try to offset reduced maritime trade caused by the US blockade on Iranian ports, but these alternative routes offer less capacity and efficiency than commercial shipping through the strait. Deputy Parliament Speaker Haji Babaei stated on May 31 that Iran is avoiding the US blockade on Iranian ports by using alternative routes and land corridors.[22] He claimed that Iran now imports at least 50 percent of basic

goods through the Caspian Sea and argued that Iran must continue to develop alternative trade routes to ensure Iran's economic security under the blockade.[23] Iranian state media separately claimed on May 31 that Iran has imported over 20.5 million tons of goods this year, which marks an increase compared to the past two years.[24] Iranian state media added that Indian goods are transported by rail and road to Iran via Armenia, Turkey, and Azerbaijan.[25] An economics expert told Radio Free Europe (RFE) on May 6 that alternative routes can supply Iran with goods but cannot fully replace a maritime container-based economy.[26] A former US economic adviser separately told RFE on May 6 that trucking is more expensive than shipping and that Caspian Sea import throughput is constrained by limited port and fleet capacity, which the former adviser stated may raise costs and inflation in Iran.[27]

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

Iran fired a ballistic missile at a Kurdistan Freedom Party (PAK) base in Iraqi Kurdistan on May 31, likely in response to an attack by Kurdish opposition groups in Iran on May 29.[28]

The IRGC and IRGC-affiliated media stated on May 31 that the IRGC fired a ballistic missile targeting a PAK base in Iraqi Kurdistan.[29] A PAK spokesperson told Kurdish media on May 31 that an Iranian ballistic missile struck a PAK headquarters in Darashakran, Erbil Province, without causing casualties.[30] The spokesperson added that Iran struck the same base on May 25 with at least four missiles and several drones, which wounded nine people, and claimed that Iranian forces and Iranian-backed Iraqi militias have attacked PAK forces over 50 times since the war began on February 28.[31] Iran's ballistic missile attack on the PAK base comes after likely Kurdish opposition fighters attacked a border guard unit in Chaldran County, West Azerbaijan Province, near Iran's northwestern border on May 29.[32] It also comes after the IRGC reportedly killed two PAK members in Kermanshah Province on May 28.[33] The Iranian regime has historically accused Kurdish opposition groups of fomenting unrest in Iran and facilitating Israeli operations in Iran from Iraqi Kurdistan.[34]

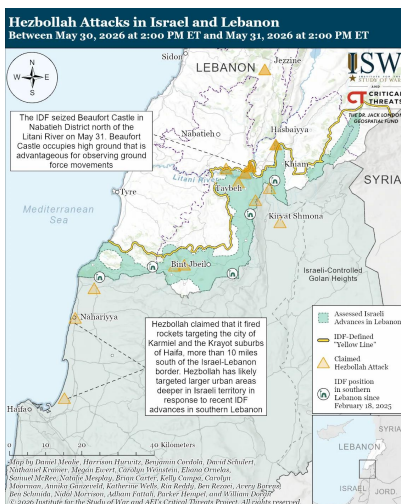
Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) has continued to conduct ground offensives beyond its "Yellow Line" and has advanced further north of the Litani River in southern Lebanon. The IDF announced on May 30 that 36th Armored Division units have launched new ground offensives on both sides of the Litani River to expand the IDF's "Yellow Line," destroy Hezbollah infrastructure, and strengthen the IDF's operational control in southern Lebanon.[35] Israeli military and political sources, including Prime Minister Benjamin Netanyahu, announced that the IDF seized Beaufort Castle in Nabatieh District on May 31 as part of the IDF's new ground offensives.[36] Beaufort Castle is operationally significant to the IDF because the castle is located on high ground, which is favorable for observing ground force movements. The site is also symbolic because the IDF previously seized the site after a significant battle during the Israeli invasion of Lebanon in 1982.[37] Hezbollah claimed that it used direct fire to defend against Israeli advances into two towns near Beaufort Castle during protracted ground engagements between May 26 and 30.[38] Hezbollah has increasingly used direct fire in protracted

ground engagements with advancing Israeli forces in southern Lebanon since May 19.[39]

Hezbollah has expanded the scope of its attacks on northern Israel by targeting larger urban areas deeper inside Israeli territory, likely in response to recent IDF advances in southern Lebanon.[40] Hezbollah claimed for the first time since the ceasefire began on April 16 that it fired rockets targeting Israeli cities more than 10 miles south of the Israel-Lebanon border, including the city of Karmiel and the Krayot suburbs of Haifa, on May 30 and 31.[41] An Israeli military correspondent also reported that Hezbollah fired rockets targeting Acre in northern Israel on May 31, although Hezbollah did not claim this attack.[42]



Other Axis of Resistance Activity

The United States recently warned Iraqi Prime Minister-designate Ali al Zaydi that the United States opposes the participation of any Iranian-backed Iraqi militia in the next Iraqi government, even if a militia states that it intends to disarm, according to an informed political source speaking to Iraqi media on May 31.[43] The US message reportedly stated that the United States may break off “political or administrative relations” with any ministry affiliated with an Iraqi militia.[44] The US warning comes after a Shia Coordination Framework source told Iraqi media on May 25 that some militias have expressed willingness to disarm and engage in Iraqi politics in exchange for securing “senior positions” within the Iraqi government.[45] An Iraqi committee comprised of Zaydi, Iranian-backed Badr Organization head Hadi al Ameri, and caretaker Prime Minister Mohammad Shia al Sudani was reportedly close to finalizing a plan to disarm Iraqi militias, according to a regional media report on May 8.[46] 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 allied targets in Iraq and the region during the recent war.[47]



Endnotes

- [1] <https://www.axios.com/2026/05/31/trump-iran-deal-changes-nuclear>
- [2] <https://www.axios.com/2026/05/31/trump-iran-deal-changes-nuclear>
- [3] <https://www.axios.com/2026/05/31/trump-iran-deal-changes-nuclear>
- [4] <https://www.axios.com/2026/05/31/trump-iran-deal-changes-nuclear>

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[11] <https://www.axios.com/2026/05/28/iran-peace-deal-trump-approval>
[12] <https://t.me/mehrnews/381432>
[13] <https://www.nytimes.com/2026/05/30/us/politics/trump-iran-peace-framework.html>
[14] <https://truthsocial.com/@realDonaldTrump/posts/116658423998920803>
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[47] <https://almadapaper dot net/410670/> ; <https://www.newarab dot com/analysis/iraqs-elections-high-stakes-vote-amid-us-iran-tug-war> ;
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Iran Update Special Report, June 1, 2026



Ria Reddy, Parker Hempel, William Doran, Avery Borens, Annika Ganzeveld

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Key Takeaways

1. The Iranian regime, which ISW-CTP continues to assess is dominated by Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi and his inner circle, suspended US-Iran negotiations on June 1. Vahidi and his inner circle likely calculate that the status quo, in which Iran has neither made concessions to the United States in a diplomatic agreement nor is engaged in a full-scale conflict with the United States, is a favorable situation that advances their objectives. IRGC-affiliated Tasnim News Agency announced on June 1 that the regime has suspended negotiations, ostensibly in response to Israeli operations against Hezbollah in Lebanon.
2. The Iranian regime's decision to suspend negotiations and emphasize the Lebanon issue is almost certainly a response to US President Donald Trump's recent amendments to the draft US-Iran memorandum of understanding (MoU).
3. The Iranian regime has likely focused on the Lebanon issue, as opposed to another key sticking point in negotiations, to try to curb Israeli operations against Hezbollah in Lebanon as part of the regime's broader objective to preserve Hezbollah. The regime also likely seeks to drive a wedge between the United States and Israel by falsely blaming Israel and its operations in Lebanon for the collapse of the US-Iran talks. Vahidi and his inner circle also likely calculate that the status quo will help them advance several other objectives, such as solidifying Iranian control over the Strait of Hormuz and maintaining the Iranian nuclear program.
4. The suspension of negotiations further indicates that Vahidi and his inner circle are driving Iranian decision-making and have likely gained the upper hand over proponents of a deal, particularly Parliament Speaker Mohammad Bagher Ghalibaf.
5. Iran and the United States have exchanged limited fire over the past 48 hours. Islamic Revolutionary Guards Corps (IRGC)-affiliated media announced on May 31 that Iranian air defenses shot down a US MQ-1 Predator drone over "Iranian territorial waters." US Central Command (CENTCOM) responded by launching defensive strikes against Iranian targets on Qeshm Island and in Goruk, Hormozgan Province. The IRGC retaliated against the US strikes by launching two missiles at US forces in Kuwait on May 31.

- Iranian forces also likely attacked a civilian cargo vessel located off the coast of Iraq on June 1. United Kingdom Maritime Trade Operations reported on June 1 that an unspecified projectile struck a cargo vessel transiting the northern Persian Gulf approximately 40 nautical miles southeast of the Umm Qasr Port in Iraq.

Toplines

The Iranian regime, which ISW-CTP continues to assess is dominated by Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi and his inner circle, suspended US-Iran negotiations on June 1.[1] Vahidi and his inner circle likely calculate that the status quo, in which Iran has neither made concessions to the United States in a diplomatic agreement nor is engaged in a full-scale conflict with the United States, is a favorable situation that advances their objectives. IRGC-affiliated Tasnim News Agency announced on June 1 that the regime has suspended negotiations, ostensibly in response to Israeli operations against Hezbollah in Lebanon.[2] The fact that IRGC-affiliated media announced the suspension of negotiations suggests that the decision to suspend negotiations was driven by the IRGC, and presumably by Vahidi. Iranian officials have consistently demanded throughout negotiations that the US-Iran ceasefire must include Hezbollah, but Iranian officials significantly increased their emphasis on this demand after Tasnim announced the suspension of negotiations.[3] Supreme Leader Adviser Mohammad Mokhber, for example, stated on June 1 during a meeting with Hezbollah's representative to Tehran that any ceasefire that excludes Hezbollah is "irrelevant." [4]

The Iranian regime's decision to suspend negotiations and emphasize the Lebanon issue is almost certainly a response to US President Donald Trump's recent amendments to the draft US-Iran memorandum of understanding (MoU). Trump requested several amendments, including changes to the draft's text about Iran's highly enriched uranium (HEU) and the Strait of Hormuz.[5] An Iranian official close to Iran's negotiating team stated on June 1 that Iran has "concerns" about Trump's amendments and reiterated that Iran will not transfer its HEU to the United States and that Iran must "manage" the Strait of Hormuz.[6] Iran likely responded to Trump's amendments by reemphasizing its own maximalist demands, particularly its insistence that any ceasefire agreement between the United States and Iran must include Lebanon.

The Iranian regime has likely focused on the Lebanon issue, as opposed to another key sticking point in negotiations, to try to curb Israeli operations against Hezbollah in Lebanon as part of the regime's broader objective to preserve Hezbollah. Khatam ol Anbia Central Headquarters Commander Major General Ali Abdollahi Ali Abadi issued an implicit threat on June 1 to attack civilians in northern Israel if the Israel Defense Forces (IDF) conducts airstrikes targeting Beirut.[7] Abadi's warning comes after Israeli Prime Minister Benjamin Netanyahu ordered the IDF to conduct strikes against Hezbollah targets in Beirut and broaden the scope of IDF operations against Hezbollah in Lebanon.[8] Iran rarely issues public warnings before conducting attacks, which suggests that Abadi's threat sought to achieve an informational effect. The regime likely intended to pressure the United States to push Israel to limit its operations against Hezbollah by threatening to attack Israel if Israel expanded its operations in Lebanon.

President Trump held a phone call with Israeli Prime Minister Benjamin Netanyahu on June 1 and stated that Israel will not attack Beirut.[9] Trump also noted that he had a "very good call" with Hezbollah via representatives, during which Hezbollah reportedly agreed to halt attacks against Israel. Axios, citing an adviser to Lebanese Parliament Speaker and longtime Hezbollah ally Nabih Berri, reported on June 1 that Berri informed the United States that Hezbollah is prepared to implement a "full and immediate

ceasefire.”[10] Netanyahu stated that he told Trump that Israel would not cease attacks on Beirut if Hezbollah does not halt attacks on Israeli civilians and cities and added that Israeli operations in southern Lebanon will continue as planned.[11] Iran has long viewed Hezbollah as a central component of its deterrence strategy and therefore likely views an extension of the Israel-Lebanon ceasefire and halt of Israeli operations in Lebanon as necessary to prevent the further degradation of Hezbollah.

The regime also likely seeks to drive a wedge between the United States and Israel by falsely blaming Israel and its operations in Lebanon for the collapse of the US-Iran talks. The US-Iran negotiations have been at an impasse due to disagreements over other key sticking points for weeks, however. Senior Iranian officials and state media have framed Israeli operations in Lebanon as a ceasefire violation and cited the operations as the reason for suspending negotiations.[12] These statements seek to place blame for the collapse of the talks on Israel, and the regime likely calculates that portraying Israel as undermining US diplomatic efforts could create tensions between the United States and Israel. The US-Iran negotiations have been at an impasse for weeks, however, primarily due to disagreements over the Iranian nuclear program, the Strait of Hormuz, and Iranian demands for economic relief.[13] Iranian officials have previously tied the Lebanon issue to the negotiations, but it has not been the main sticking point preventing a deal up to this point.

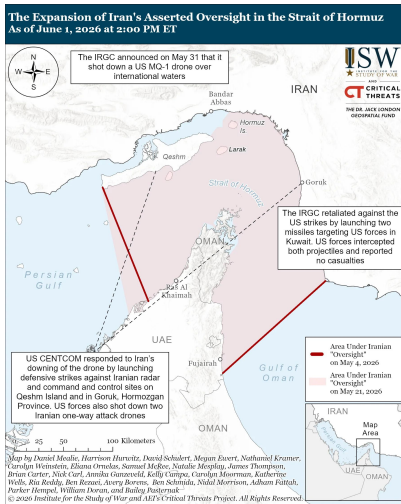
Vahidi and his inner circle also likely calculate that the status quo will help them advance several other objectives, such as solidifying Iranian control over the Strait of Hormuz and maintaining the Iranian nuclear program. Iran continues to use coercive measures in and around the Strait of Hormuz to force vessels to transit through Iran’s illegal traffic separation scheme and comply with Iran’s protection racket.[14] Several countries have reached arrangements with Iran to facilitate their vessels’ safe passage through the strait.[15] Iran may calculate that protracting the status quo will force more countries to sign similar agreements with Iran, implicitly recognizing and legitimizing Iranian control over the strait.[16] Iran is also actively exploiting the US-Iran ceasefire to reconstitute elements of its ballistic missile and drone programs that Israel and the United States degraded during the June 2025 war and recent conflict.[17] Iran also continues to insist that it will not make any commitments regarding its enrichment capabilities or HEU stockpile.[18] The status quo, in which Iran has neither made concessions on its nuclear program nor faces US or Israeli strikes, enables Iran to maintain its nuclear program and prevent further degradation of this program. Vahidi and those around him may assess that focusing on the Lebanon issue will cause a protracted discussion about the Israel-Hezbollah ceasefire and thereby deflect attention from the above issues, which Vahidi refuses to make concessions on.

The suspension of negotiations further indicates that Vahidi and his inner circle are driving Iranian decision-making and have likely gained the upper hand over proponents of a deal, particularly Parliament Speaker Mohammad Bagher Ghalibaf. Vahidi and his inner circle have consistently opposed compromise and prioritized achieving the objectives outlined above.[19] Ghalibaf, on the other hand, has sought to reach an agreement and has appeared more willing to make concessions to the United States. The regime’s decision to suspend negotiations and insist on maximalist demands, such as Hezbollah’s inclusion in the ceasefire, therefore indicates that Vahidi and his inner circle continue to dominate decision-making.

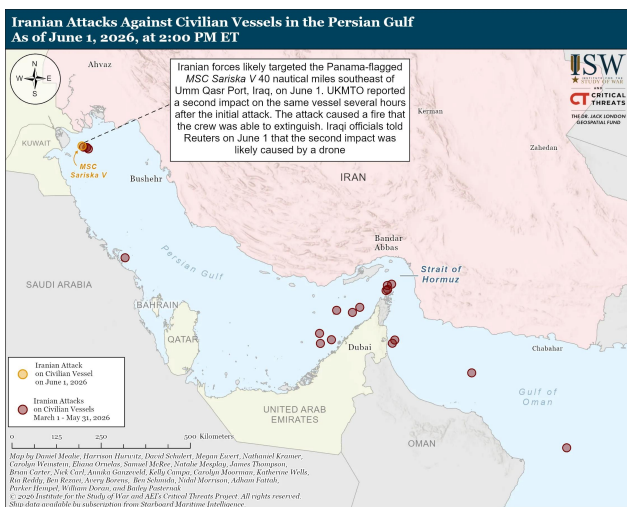
US President Donald Trump told NBC News that Iran did not inform him that it had suspended negotiations.[20] He added that the United States would not necessarily resume military operations if talks collapsed but would instead maintain its naval blockade on Iranian ports because Iran is “losing a fortune.”[21]

Iran and the United States have exchanged limited fire over the past 48 hours. IRGC-affiliated

media announced on May 31 that Iranian air defenses shot down a US MQ-1 Predator drone over “Iranian territorial waters.”[22] US Central Command (CENTCOM) confirmed on May 31 that Iranian air defenses shot down the drone but clarified that the drone was operating over international waters.[23] CENTCOM responded by launching defensive strikes targeting Iranian air defense systems, a ground control station, and two Iranian one-way attack drones on Qeshm Island and in Goruk, Hormozgan Province.[24] The IRGC retaliated against the US strikes by launching two missiles at US forces in Kuwait on May 31.[25] CENTCOM confirmed that US forces intercepted the two missiles and reported no damage or casualties.[26]



Iranian forces also likely attacked a civilian cargo vessel located off the coast of Iraq on June 1.[27] United Kingdom Maritime Trade Operations (UKMTO) reported on June 1 that an unspecified projectile struck a cargo vessel transiting the northern Persian Gulf approximately 40 nautical miles southeast of the Umm Qasr Port in Iraq.[28] Iraqi media and open-source intelligence (OSINT) accounts reported that the struck civilian vessel was the Panama-flagged *MSC Sariska V*. [29] UKMTO reported a second impact on the same vessel several hours after the initial attack.[30] The second impact caused a fire onboard, which the crew was able to extinguish.[31] Iraqi officials told Reuters on June 1 that the second impact was likely caused by a drone.[32] The IRGC Navy warned commercial vessels on June 1 that it will identify and “[deal] with” vessels that cooperate with “extra-regional hostile forces.”[33]



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.

Iranian Domestic Affairs

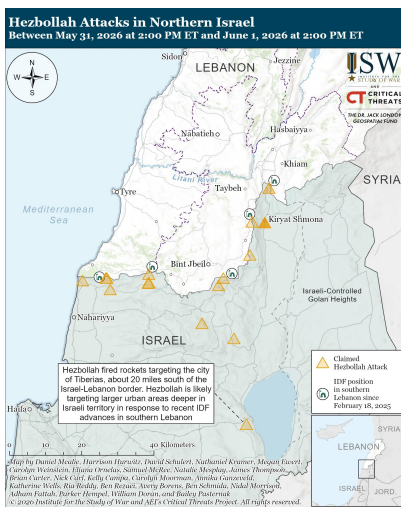
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Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Hezbollah has continued to target larger urban areas deeper inside Israeli territory, likely in response to the Israel Defense Forces' (IDF) recent advances in southern Lebanon.[34]

Hezbollah claimed that it fired rockets targeting the northern Israeli city of Tiberias, which is located about 20 miles south of the Israel-Lebanon border, on May 31.[35] An Israeli military correspondent reported that the rockets did not strike their target and caused no casualties.[36] Hezbollah has targeted several urban areas in northern Israel and has progressively targeted cities deeper inside Israeli territory in recent days.[37]



The IDF 146th Armored Division withdrew from southern Lebanon on June 1.[38] Israeli military correspondents reported that two IDF divisions, the 36th Armored Division and the 91st Territorial Division, will remain in southern Lebanon.[39] The 146th Armored Division was responsible for the IDF's

ground operations in southwestern Lebanon and established a field headquarters in Biyyadah, Tyre District, prior to its withdrawal.[40] Hezbollah has frequently targeted 146th Division outposts, vehicles, and soldiers in Biyyadah with first-person view (FPV) drones during the recent conflict.[41]

Other Axis of Resistance Activity

Nothing significant to report.

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Iran Update Special Report, June 2, 2026



Carolyn Moorman, Ben Rezaei, Parker Hempel, Adham Fattah, 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. The Iranian regime is likely trying to transform negotiations about ending the war with Iran into negotiations about ending the war in Lebanon, which Iran and Hezbollah seek to end in Israel's capitulation. The Iranian regime is likely also using the time it is buying through this negotiation tactic to try to legitimize its illegal traffic separation scheme in the Strait of Hormuz and solidify its de facto control over the strait.
2. The United States mediated a partial agreement between Israel and Hezbollah to halt Israeli strikes against Beirut and Hezbollah strikes against northern Israel. The ceasefire appears to be largely holding but is very fragile. A partial ceasefire likely does not meet Iran and Hezbollah's maximalist demand for a complete ceasefire in Lebanon, which Iran and Hezbollah view as a prerequisite for the withdrawal of Israeli forces from Lebanon.
3. Iran and the Axis of Resistance are conducting an information operation that is likely intended to pressure the United States to convince Israel to halt its operations against Hezbollah in Lebanon. Iranian officials have threatened attacks against both Israel and shipping in the Bab el Mandeb Strait in response to Israeli operations in Lebanon, likely because they calculate that the threat of an expanded conflict will drive the United States to pressure Israel to stop its operations against Hezbollah.
4. Iran is also using the time it is gaining by deflecting attention from the US-Iran negotiations to advance other objectives, such as securing Iranian control over the Strait of Hormuz. The IRGC Navy announced on June 2 that it permitted 24 vessels to pass through the strait in the past 24 hours.
5. The Iraqi Shia Coordination Framework announced its support on June 1 for restricting arms to the state and separating the Iranian-backed Popular Mobilization Forces (PMF) from all "political, partisan, and social frameworks." The framework's announcement is probably a response to intensified US pressure on the Iraqi federal government to disarm the militias, rather than an indicator that the framework intends to disarm the militias.
6. Iranian-backed Iraqi militia Asaib Ahl al Haq announced on June 2 that it has formed an internal

committee to begin “disengaging” from the PMF. This announcement comes amid Asaib Ahl al Haq leader Qais al Khazali’s public support for disarmament and shift toward political activity in recent years.

Toplines

The Iranian regime is likely trying to transform negotiations about ending the war with Iran into negotiations about ending the war in Lebanon, which Iran and Hezbollah seek to end in Israel’s capitulation. The Iranian regime is likely also using the time it is buying through this negotiation tactic to try to legitimize its illegal traffic separation scheme in the Strait of Hormuz and solidify its de facto control over the strait. Islamic Revolutionary Guards Corps (IRGC)-affiliated media outlets reported on June 2 that Iran has not sent a response to US President Donald Trump’s amendments to the draft US-Iran memorandum of understanding (MoU) and that Iran and the United States have not exchanged messages for several days.[1] IRGC-affiliated Fars News Agency, citing an informed source, reported on June 2 that Iran’s last message to the United States was a “clear message” about Lebanon.[2] Iranian officials have previously conditioned further negotiations with the United States on a ceasefire in Lebanon, but Iranian officials have coalesced around and emphasized this demand to a greater degree following Trump’s request for amendments to the draft MoU, particularly amendments related to Iran’s highly enriched uranium (HEU) and the Strait of Hormuz.[3] Iran is likely using the Lebanon issue to deflect attention from these core disputes and to protract discussions about a ceasefire in Lebanon, which buys Iran time to preserve its sources of leverage, such as its nuclear program and control over the Strait of Hormuz.

The United States mediated a partial agreement between Israel and Hezbollah to halt Israeli strikes against Beirut and Hezbollah strikes against northern Israel.[4] The ceasefire appears to be largely holding but is very fragile.[5] A partial ceasefire likely does not meet Iran and Hezbollah’s maximalist demand for a complete ceasefire in Lebanon, which Iran and Hezbollah view as a prerequisite for the withdrawal of Israeli forces from Lebanon. President Trump held a phone call with Israeli Prime Minister Benjamin Netanyahu on June 1 and stated that Israel agreed not to attack Beirut.[6] The Lebanese Embassy in Washington said that the Lebanese government received confirmation from Hezbollah that the group accepted the US-mediated proposal, in which the Israel Defense Forces (IDF) would stop strikes against Beirut in exchange for Hezbollah halting attacks on Israeli territory. The embassy stated that the ceasefire “would be extended to all Lebanese territory” over an unspecified timeframe.[7] The IDF has not struck Beirut since the US and Lebanese governments announced the partial ceasefire proposal. Hezbollah has also not claimed any attacks against northern Israel since the announcement. Israeli military correspondents reported on June 1 that Hezbollah fired two rockets and one drone at targets in northern Israel, none of which caused any casualties, however.[8] The IDF and Hezbollah continued to launch attacks against each other in southern Lebanon on June 1 and 2, which could threaten to collapse the fragile US proposal.[9] Israeli Prime Minister Benjamin Netanyahu and Israeli Defense Minister Israel Katz warned that the IDF would resume its planned strikes against Hezbollah infrastructure in Beirut if Hezbollah attacks northern Israeli communities.[10]

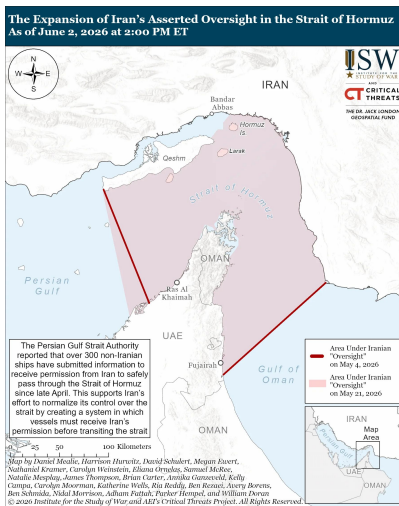
The partial ceasefire likely does not meet Iran and Hezbollah’s maximalist demand for a complete ceasefire encompassing all Lebanese territory, however. Hezbollah and Iranian officials stated on June 1 and 2 that they will not accept a partial ceasefire that only bars strikes against Beirut and demanded a complete end to Israeli operations in Lebanon.[11] Iranian Parliament Speaker Mohammad Bagher Ghalibaf told Lebanese Parliament Speaker and Hezbollah ally Nabih Berri that Iran seeks a complete ceasefire in Lebanon and will not resume negotiations with the United States until the IDF ends its operations in Lebanon, for example.[12] Hezbollah media spokesperson Youssef al Zein separately

emphasized that Israel must agree to a comprehensive cessation of hostilities across Lebanese territory.[13] Hezbollah Deputy Political Council head Mahmoud Qamati similarly told Western media that Hezbollah will not accept a partial ceasefire and warned that the group would respond to any Israeli strikes on Beirut.[14] Iran and Hezbollah would likely demand that Israeli forces withdraw from Lebanese territory following a complete ceasefire in Lebanon. Hezbollah officials have repeatedly called for a complete ceasefire in Lebanon and the complete withdrawal of Israeli forces from Lebanese territory.[15] A complete ceasefire in Lebanon and Israeli withdrawal from Lebanon would achieve Iran's objective of preserving Hezbollah, which has historically played a central role in Iran's Axis of Resistance and been a key pillar of Iran's deterrence strategy.[16]

Iran and the Axis of Resistance are conducting an information operation that is likely intended to pressure the United States to convince Israel to halt its operations against Hezbollah in Lebanon. Iranian officials have threatened attacks against both Israel and shipping in the Bab el Mandeb Strait in response to Israeli operations in Lebanon, likely because they calculate that the threat of an expanded conflict will drive the United States to pressure Israel to stop its operations against Hezbollah. Khatam ol Anbia Central Headquarters Commander Major General Ali Abdollahi Ali Abadi threatened on June 1 to attack civilians in northern Israel if the IDF conducts airstrikes targeting Beirut.[17] Iran rarely issues public warnings before conducting attacks, which suggests that Abadi's threat sought to achieve an informational effect. IRGC Quds Force Commander Brigadier General Esmail Ghaani separately threatened on June 1 that Iran will "activate" the Bab el Mandeb Strait, just like the Strait of Hormuz, in response to Israel's operations against Hezbollah in Lebanon.[18] A senior Houthi official also warned on June 2 that the group's "hands are on the trigger." [19] Iran and the Houthis have consistently threatened to resume attacks against shipping in the Bab el Mandeb Strait throughout the war, but have not acted on those threats, which suggests that their current threats are intended to achieve the effect of pressuring the United States to convince Israel to halt its operations against Hezbollah.[20]

The Iranian regime also seeks to exploit the Lebanon issue to try to sow divisions between the United States and Israel. Iranian Parliamentary National Security and Foreign Policy Committee member Fadahassein Maleki claimed on June 2 that Israeli Prime Minister Benjamin Netanyahu increased operations against Hezbollah in southern Lebanon to disrupt US-Iran negotiations after Netanyahu allegedly realized that Trump's approach did not align with Israeli demands.[21] This and similar statements from Iranian officials suggest that the Iranian regime is trying to portray Israel as the main obstacle to a US-Iran deal and an end to the war with Iran.

Iran is also using the time it is gaining by deflecting attention from the US-Iran negotiations to advance other objectives, such as securing Iranian control over the Strait of Hormuz. The IRGC Navy announced on June 2 that it permitted 24 vessels to pass through the strait in the past 24 hours.[22] It warned that it will implement "smart control" over the strait and claimed that "evil foreigners" have no place in the Persian Gulf or the strait.[23] The US-sanctioned Persian Gulf Strait Authority (PGSA) separately claimed on June 1 that over 300 non-Iranian vessels have submitted information to receive permission from Iran to transit through the strait since late April, which supports Iran's efforts to normalize its control over the strait by forcing vessels to comply with its transit protocols.[24] The IRGC Navy and PGSA's statements highlight how Iran is trying to normalize its coercive transit regime, which includes Iran's illegal and unrecognized traffic separation scheme, permit system, and toll scheme.



Even if Israel and Hezbollah reach a ceasefire in Lebanon, Iran could condition further US-Iran negotiations on additional US concessions. Former IRGC Commander Major General Mohammad Ali Jafari previously stated on May 11 that Iran would not enter negotiations with the United States until the United States accepted Iran's terms, including an end to the war on "all fronts," sanctions relief, the release of frozen Iranian assets, compensation for war-related damages, and recognition of Iran's sovereignty over the Strait of Hormuz.[25] Iran is currently imposing its demand for a ceasefire on "all fronts" on the United States, but could demand additional US concessions—such as economic relief—even if the United States agrees to accept Iran's demand for a complete ceasefire in Lebanon. An Iranian negotiating team member close to Parliament Speaker Mohammad Bagher Ghalibaf stated on June 2 that Iran would withdraw from any US-Iran agreement or refuse to enter the next phase of negotiations if Iran could not access its frozen assets, sell oil during the 60-day negotiations period, lift the blockade, or agree to Iranian demands related to the Strait of Hormuz.[26] Giving in to Iranian preconditions would reduce US leverage in future negotiations and make it harder to extract concessions from Iran on its nuclear program and the Strait of Hormuz.

The Iraqi Shia Coordination Framework announced its support on June 1 for restricting arms to the state and separating the Iranian-backed Popular Mobilization Forces (PMF) from all "political, partisan, and social frameworks."[27] **The framework's announcement is probably a response to intensified US pressure on the Iraqi federal government to disarm the militias, rather than an indicator that the framework intends to disarm the militias.** The PMF is an Iraqi state security service comprised of multiple Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[28] The framework did not specify what it meant by "restricting weapons to the state" or "political, partisan, and social frameworks." The framework could be referring to an effort to separate militias' political wings from militia-controlled PMF brigades and restricting weapons to the PMF. The framework's statement affirmed the PMF as an official state institution.[29] The framework's announcement follows the framework's formation in May 2026 of a committee, including incumbent Prime Minister Ali al Zaydi, former Prime Minister Mohammad Shia al Sudani, and Badr Organization head Hadi al Ameri, to develop a mechanism to disarm the militias and integrate their members into state institutions.[30] These disarmament efforts come amid increased US pressure on the Iraqi federal government to decrease Iranian influence in Iraq, including through militia disarmament, due to US militia attacks against US and foreign targets in Iraq and the region during the war.[31] Multiple sources close to framework leaders told Iraqi media on June 2 that framework leaders are concerned that the United States will not accept the "mere formality of disarmament," but will instead pressure Baghdad to dissolve the PMF.[32]

The framework's statement conditioned militia disarmament on the end of the international

coalition's mission in Iraq.[33] US-led international coalition forces completed their mission in federal Iraq in January 2026, but continue to operate in Iraqi Kurdistan.[34] The United States and Iraq agreed in September 2024 that all US-led international coalition forces would withdraw from Iraq by the end of 2026. Iranian-backed Iraqi militias disproportionately attacked US positions in Iraqi Kurdistan during the war.[35] Iranian-backed Iraqi militias used violent and non-violent means for years to pressure the United States to remove US forces from federal Iraq.[36]

The framework is a loose coalition of Iraqi Shia political parties, some of which Iran backs, and it is unclear which specific elements of the framework supported this announcement. The framework includes the political wings of multiple Iranian-backed Iraqi militias that have recently rejected disarmament, including Kataib Hezbollah.[37] Kataib Sayyid al Shuhada and Harakat Hezbollah al Nujaba also reportedly reject disarmament.[38] These militias have, both historically and during the war, been the most kinetically active and are more subordinate to Iran than other Iraqi militias.[39]

Iranian-backed Iraqi militia Asaib Ahl al Haq announced on June 2 that it has formed an internal committee to begin “disengaging” from the PMF. This announcement comes amid Asaib Ahl al Haq leader Qais al Khazali’s public support for disarmament and shift toward political activity in recent years.[40] Asaib Ahl al Haq said that the group’s military spokesperson will lead the committee, which will inventory personnel, weapons, vehicles, and logistical supplies.[41] The committee will also organize communication mechanisms with the prime minister, according to Asaib Ahl al Haq.[42] It is unclear if “disengaging from the PMF” refers to ending Asaib Ahl al Haq’s control over its affiliated PMF brigades or some other action. Asaib Ahl al Haq controls the 41st, 42nd, and 43rd PMF brigades.[43] Iraq analysts have long noted that Asaib Ahl al Haq’s leadership, particularly Khazali, has focused on politics more than kinetic activity in recent years, including during the October 7 War.[44] The US-Israeli combined force struck multiple Asaib Ahl al Haq positions during the recent war as part of its effort to degrade Iranian-backed Iraqi militias’ ability to attack the United States and Israel.[45] The US Treasury Department also noted in April 2026 that Asaib Ahl al Haq had conducted drone attacks targeting US and coalition forces in northern Iraq in March 2026.[46] It is unclear if Asaib Ahl al Haq sanctioned this kinetic activity. Khazali has pledged his public support for militia disarmament in recent months.[47] CTP-ISW previously identified indications of splinters within Asaib Ahl al Haq regarding disarmament.[48] Asaib Ahl al Haq and several other members of the Iraqi Resistance Coordination Committee, which is a militia coordinating committee, signed a statement in January 2026 rejecting Iraqi militia disarmament due to the continued presence of US and Turkish troops in Iraqi Kurdistan, for example.[49]

Khazali could be signaling his willingness to disarm in order to lessen US resistance to Asaib Ahl al Haq’s political wing controlling an Iraqi ministry. Iraqi media reported on June 2 that the United States has continued to oppose the allocation of any ministerial portfolio to political parties tied to Iranian-backed Iraqi militias, even if the militias have announced their disarmament.[50] Asaib Ahl al Haq’s political wing, Sadiqoun, won 27 seats in the November 2025 elections, which would typically be enough seats to gain control of an Iraqi ministry.[51] The Iraqi parliament approved 14 out of 23 ministers of incumbent Prime Minister Ali al Zaydi’s government on May 14, but multiple ministries, including the defense and interior ministries, remain unfilled.[52] Asaib Ahl al Haq has said that it will decide on its participation in the next Iraqi government after the issue of restricting arms to the state is addressed.[53] Two framework sources told AP on May 14 that IRGC Quds Force Commander Brigadier General Esmail Ghaani told several framework and militia leaders to postpone voting on ministries in which militia-affiliated political parties are vying for positions.[54] It is currently unclear why Ghaani called for this delay.

Iranian-backed Iraqi militia Kataib al Imam Ali, whose political wing controls five seats in

parliament, also announced its readiness to restrict weapons to the Iraqi state, possibly to overcome US opposition to its involvement in the next government.[55] Kataib al Imam Ali announced on June 2 that it will begin to “disengage” from the PMF and restrict weapons to the Iraqi state.[56] The militia announced that it will form multiple committees to handle issues such as the transfer of weapons to the state, the families of martyrs and wounded fighters, and the reintegration of militia personnel and affiliates into the Iraqi state.[57] US opposition to militia involvement in the next government has mainly focused on the cabinet level, but Kataib al Imam Ali could be attempting to avoid US pushback to the group’s participation in the government in another capacity.[58]

The framework’s announcement, along with Asaib Ahl al Haq and Kataib al Imam Ali’s announcements, follows reports of Iranian pressure on its Iraqi partners to stop all kinetic activity, likely to avoid US financial pressure against Iraq that negatively impacts Iran. Ghaani reportedly warned about “real dangers” that could result in a loss of military privileges and discussed the need for an “alternate plan” regarding militia disarmament with militia and framework leaders in Baghdad in April 2026.[59] Ghaani reportedly proposed that some militias end all kinetic activity while preserving the PMF and consolidating the political role of Iranian-backed Iraqi militias.[60] US financial pressure on Iraq, such as the US Treasury Department’s reported decision to halt shipments of Iraqi export oil revenue to Iraq, heavily impacts Iran due to Iran’s use of the Iraqi economy for sanctions evasion and to help fund the Axis of Resistance.[61] CTP-ISW continues to assess that Iran could decide to build a new cadre of ideological militias, over which Iran has strong control, that would supplement the political activity of Iranian-backed Iraqi actors. Ghaani reportedly instructed several framework and militia leaders in May not to proceed with disarmament until the trajectory of the US-Iran negotiations becomes clear.[62] Iran likely wishes to maintain the militias’ military strength in the event of renewed conflict with the United States and Israel.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

The Institute for Science and International Security assessed on June 2 that Iran is securing the Fordow Fuel Enrichment Plant in preparation for a potential US ground operation to seize Iran’s highly enriched uranium (HEU) stockpile.[63] The Institute stated that Iran has created “rocky mounds” on the roads leading to Fordow’s tunnel entrances and that the mounds are positioned in a way to hinder the movement of hostile forces attempting to enter or exit the tunnels.[64] The Institute added that Iran did not completely block the roads like it has at the Esfahan Nuclear Technology Center (ENTC), which indicates that Iran still seeks to access Fordow.[65] All of Fordow’s tunnel entrances have remained buried as of May 26, however.[66] Iran’s HEU is buried underneath rubble at the ENTC, Fordow, and Natanz, which the United States and Israel struck during the 12-day war.

Iran’s Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See topline section.

Other Axis of Resistance Activity

See topline section.

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Endnotes

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Iran Update Special Report, June 3, 2026



Adham Fattah, Ben Rezaei, William Doran, Kelly Campa, Ria Reddy, Katherine Wells, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

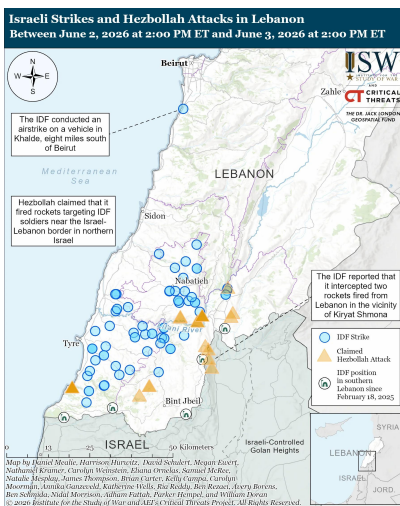
The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates focus on US and Israeli strikes on Iran and Iran and the Axis of Resistance's response to the strikes.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

Key Takeaways

1. Iran and Hezbollah are continuing to try to transform negotiations about ending the war over the Strait of Hormuz into negotiations about ending the war in Lebanon, which Iran and Hezbollah seek to end in Israel's capitulation. The Iranian regime likely also calculates that it can preserve its leverage on other issues in negotiations with the United States, such as its nuclear program and control of the Strait of Hormuz, by deflecting talks to the war in Lebanon.
2. US President Donald Trump announced on June 1 a partial ceasefire between Israel and Hezbollah in which Israel would not attack Hezbollah targets in Beirut and Hezbollah would halt attacks against Israel. Hezbollah officials claimed after Trump's announcement that the group would not adhere to a partial ceasefire, however. Hezbollah conducted rocket attacks targeting the Israel Defense Forces (IDF) in northern Israel on June 3 for the first time since June 1.
3. Senior Hezbollah officials have continued to demand a complete ceasefire and the withdrawal of Israeli forces from Lebanon. Iranian officials have echoed Hezbollah's maximalist demands for a complete ceasefire in Lebanon and withdrawal of Israeli forces from Lebanon as part of Iran's effort to create a protracted discussion about the Lebanon issue and thereby deflect attention from negotiations about the Strait of Hormuz and other key points of disagreement.
4. The Iranian regime likely calculates that it can preserve its leverage on other issues in negotiations with the United States, such as its nuclear program and control of the Strait of Hormuz, by deflecting talks to the war in Lebanon.
5. The Iranian regime is trying to impose costs on the United States for continuing to enforce its blockade while also trying to strain Gulf states' relations with the United States.
6. Iranian Parliament Speaker and Iran's Special Representative for the People's Republic of China (PRC) Affairs, Mohammad Bagher Ghalibaf, appears to be performing an executive-level role in Iran's economic and foreign policy, amid reports of President Masoud Pezeshkian being sidelined.
7. Eighty-five Iranian parliamentarians implicitly called for the development of intercontinental ballistic missile (ICBM) capabilities in a letter to Supreme Leader Mojtaba Khamenei on May 31.

Toplines

Iran and Hezbollah are continuing to try to transform negotiations about ending the war over the Strait of Hormuz into negotiations about ending the war in Lebanon, which Iran and Hezbollah seek to end in Israel's capitulation. US President Donald Trump announced on June 1 a partial ceasefire between Israel and Hezbollah in which Israel would not attack Hezbollah targets in Beirut and Hezbollah would halt attacks against Israel.[1] Israeli Prime Minister Benjamin Netanyahu subsequently announced that Israel would attack Hezbollah targets in Beirut if Hezbollah continued to attack Israel, suggesting that he agreed not to strike Beirut if Hezbollah ceased attacks on Israel.[2] The Lebanese Embassy in Washington claimed on June 1 that Hezbollah had agreed to cease attacks on northern Israel.[3] Hezbollah officials claimed after Trump's announcement that the group would not adhere to a partial ceasefire, however.[4] Hezbollah conducted rocket attacks targeting the Israel Defense Forces (IDF) in northern Israel on June 3 for the first time since June 1.[5] Hezbollah claimed that it fired rockets targeting IDF soldiers near the Israel-Lebanon border on June 3, several hours after the IDF conducted an airstrike targeting a vehicle in Khalde, eight miles south of Beirut.[6] Israeli Ambassador to the United States Yechiel Leiter called Hezbollah's June 3 attack a violation of the partial ceasefire and suggested that Israel could respond by attacking Hezbollah targets in Beirut.[7] An Israeli military correspondent reported on June 3 that Netanyahu is set to meet with senior Israeli officials to determine Israel's response to Hezbollah's attack.[8]



Senior Hezbollah officials have continued to demand a complete ceasefire and the withdrawal of Israeli forces from Lebanon. Hezbollah Political Council member Mahmoud Qamati told Western media that Hezbollah will not accept a partial ceasefire and later said that “there was no ceasefire agreement.”[9] Hezbollah officials have demanded that the IDF cease all military operations in Lebanon and fully withdraw from southern Lebanon and claimed that the group will make “whatever sacrifices are required” to expel Israeli forces from southern Lebanon.[10] A Hezbollah parliamentarian said on June 2 that one of Hezbollah's primary objectives is to obtain a timeframe for a full Israeli withdrawal from Lebanon.[11] These positions are consistent with Hezbollah Secretary General Naim Qassem's demands that the IDF halt all operations against Hezbollah and withdraw from Lebanon.[12]

Iranian officials have echoed Hezbollah's maximalist demands for a complete ceasefire in Lebanon and withdrawal of Israeli forces from Lebanon as part of Iran's effort to create a protracted discussion about the Lebanon issue and thereby deflect attention from negotiations about the Strait of Hormuz and other key points of disagreement. Iranian Foreign Affairs Minister Abbas Araghchi told Hezbollah-affiliated media on June 3 that Iran and Lebanon are “linked” and that conflict with the United States and Israel will not end unless Israeli forces withdraw from

southern Lebanon.[13] Iranian Parliamentary National Security and Foreign Policy Commission Chairman Ebrahim Azizi told Hezbollah officials on June 3 that ending the war with the United States and Israel on all fronts, “especially in Lebanon,” is at the “forefront” of Iran’s ceasefire agreement with the United States.[14] Islamic Revolutionary Guards Corps (IRGC)-affiliated media outlet Tasnim News Agency argued on June 3 that there must be a complete ceasefire between Hezbollah and Israel and a complete withdrawal of Israeli forces from Lebanon. The outlet also highlighted how Iran can use Hezbollah to deter and preserve its leverage against Israel and the United States.[15] A political analyst close to the regime also noted on June 3 that the preservation of Hezbollah is “a geopolitical, strategic, and national security imperative for Iran.”[16]

The Iranian regime also likely calculates that it can preserve its leverage on other issues in negotiations with the United States, such as its nuclear program and control of the Strait of Hormuz, by deflecting talks to the war in Lebanon. The US-sanctioned Persian Gulf Strait Authority (PGSA) continued to post data on June 3 about ships requesting Iranian permission to pass through the strait.[17] Tasnim News Agency argued on June 3 that the PGSA’s reports “show the stabilization of Iranian sovereignty over the strait.” This comment is consistent with ISW-CTP’s assessment that Iran is using the ceasefire period to try to normalize Iranian control over the Strait of Hormuz.[18] Tasnim also stated that the Iranian regime is prioritizing achieving sovereignty over the strait over collecting tolls from vessels that transit through Iran’s illegal traffic separation scheme. ISW-CTP assessed on May 14 that Iran may be prioritizing upholding the “legitimacy” of its claims to the Strait of Hormuz over toll collection.[19] These comments reflect how Iranian decision-makers are using the current situation to try to solidify de facto Iranian control over the Strait of Hormuz. A protracted discussion about Lebanon also deflects from negotiations over Iran’s highly enriched uranium stockpile and ability to enrich uranium on Iranian territory, which Iranian decision-makers have refused to make concessions on.

The Iranian regime is trying to impose costs on the United States for continuing to enforce its blockade while also trying to strain Gulf states’ relations with the United States. US Central Command (CENTCOM) stated on June 2 that US naval forces disabled an Iranian-affiliated tanker, the Botswana-flagged M/T *Lexie*, that was transiting toward Iran’s Kharg Island in violation of the US blockade.[20] Iranian forces then launched attack drones at civilian ships trying to transit the Persian Gulf. US forces intercepted three of the drones.[21] The IRGC also claimed that it launched anti-ship missiles at the Liberia-flagged MSC *Panaya*, which it claimed belongs to the United States and Israel.[22] US forces subsequently conducted self-defense strikes against drone ground control stations on Qeshm Island in the Strait of Hormuz.[23] Iranian forces then retaliated by firing ballistic missiles and drones at US bases in Kuwait and Bahrain.[24] The Kuwaiti Defense Ministry stated on June 3 that Kuwaiti forces intercepted 13 ballistic missiles and 17 drones.[25] Two Iranian missiles hit Kuwait International Airport, however, killing one person, injuring at least 63 others, and causing significant damage.[26] US and Bahraini air defenses also intercepted three ballistic missiles, one of which targeted the US Fifth Fleet Headquarters in Manama.[27] The Iranian regime’s English-language media outlet, Press TV, claimed that Iran’s attacks sent a message to Gulf countries that their “territory is not safe” if they continue to host US forces.[28] This comment reflects Iran’s efforts to drive a wedge between the Gulf states and the United States by threatening to attack the Gulf states if they cooperate with the United States. Iran’s efforts to sow divisions between the Gulf states and the United States are part of Iran’s broader strategic objective to expel the United States from the Middle East.



Iranian officials and media responded to these attacks with further threats, probably to try to deter the United States from enforcing its blockade on Iranian ports. Iranian Supreme Leader Mojtaba Khamenei’s military adviser, Mohsen Rezaei, stated on X on June 3 that Iran will not allow the United States to make “excessive demands” in negotiations and will respond to any US military action with a “barrage of missiles and drones.”[29] Press TV also argued that Iran will intensify its responses to US military action to deter the United States from taking such action.[30]

Iranian Parliament Speaker and Iran’s Special Representative for the People’s Republic of China (PRC) Affairs, Mohammad Bagher Ghalibaf, appears to be performing an executive-level role in Iran’s economic and foreign policy. Ghalibaf convened the Iranian Central Bank governor, Planning and Budget Organization head, and oil, economy, and industry ministers on June 3 to coordinate Iran’s economic policy toward the PRC.[31] This meeting marks the first meeting that Ghalibaf has convened as Iran’s special representative for PRC affairs since Supreme Leader Mojtaba Khamenei appointed him to this position on May 17.[32] The meeting was unusual because parliament speakers in Iran do not normally convene government officials to coordinate and implement foreign economic policy. IRGC-affiliated Tasnim News Agency previously emphasized on May 17 that Ghalibaf’s new role carries a different “level of authority” than previous PRC-related representative roles.[33] The meeting to discuss Iran’s economic policy toward the PRC also highlights how Ghalibaf seeks to deepen cooperation with US adversaries such as the PRC.

Ghalibaf’s meeting notably comes as President Masoud Pezeshkian appears to have been sidelined in the regime. Anti-regime media reported on May 31 that Pezeshkian recently submitted his resignation letter to Supreme Leader Mojtaba Khamenei due to IRGC officials’ growing dominance in the regime.[34] ISW-CTP continues to assess that IRGC Commander Major General Ahmad Vahidi and his inner circle are dominating regime decision-making and have gained the upper hand over Ghalibaf.[35] The fact that Ghalibaf appears to be playing an executive-level role does not mean that Ghalibaf holds the same influence over regime decision-making that Vahidi does.

Eighty-five Iranian parliamentarians implicitly called for the development of intercontinental ballistic missile (ICBM) capabilities in a letter to Supreme Leader Mojtaba Khamenei on May 31.[36] The parliamentarians stated that Parliament will support Iran’s military forces and defense industry until Iranian missiles can reach the United States.[37] Iran’s known longest-range missiles are the Emad, Sejil, and Shahab-3, which have a reported range of 2,000 kilometers.[38] Iran attempted to launch two ballistic missiles targeting Diego Garcia in March 2026, which is approximately 3,700 kilometers from Iran’s southern border, marking the furthest ever attempted Iranian missile strike.[39] One of the missiles failed in flight, while US forces intercepted the other.[40]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

The United States continues to apply economic pressure on the Iranian regime by isolating the regime from international markets. The US Treasury Department sanctioned four major Iranian cryptocurrency exchanges and their leadership on June 2 for facilitating Iranian sanctions evasion.[41] The US Justice Department separately announced on June 3 that US law enforcement arrested a dual US-Iranian national and CEO of an Iran-based tech firm for evading US sanctions for more than a decade by covertly purchasing and exporting US-origin networking and encryption equipment to Iranian nuclear and military entities.[42] The CEO reportedly laundered over \$15 million USD through international intermediaries.[43]

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Hezbollah has continued to use first-person view (FPV) drones equipped with thermal cameras to conduct nighttime attacks targeting Israeli forces in southern Lebanon, likely in response to the IDF ground forces' own tactical adjustments to operate at night to avoid Hezbollah FPV drone reconnaissance and attacks. Hezbollah posted footage from several FPV drones using thermal cameras to identify and strike Israeli positions at night on June 1 and 2.[44] Hezbollah has likely begun equipping FPV drones with thermal cameras for nighttime attacks on Israeli forces since at least May 23.[45] Hezbollah has primarily conducted nighttime FPV drone attacks on Israeli forces advancing north of the Litani River in recent days.[46] Hezbollah is also likely using FPV drones at night to degrade Israeli forces' morale and maximize psychological distress, as these capabilities increase the risk of more frequent and unpredictable attacks.[47] Hezbollah may have posted footage of its nighttime FPV attacks to increase fear among the Israeli public and generate popular domestic pressure on Israeli political leaders to end the IDF's campaign in Lebanon as well.[48]

Other Axis of Resistance Activity

Nothing significant to report.

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Iran Update Special Report, June 4, 2026



Carolyn Moorman, William Doran, Katherine Wells, Benjamin Schmida, Avery Borens, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Hezbollah and Iranian leaders continue to reject any ceasefire framework in Lebanon that does not meet their maximalist demand for total Israeli capitulation in Lebanon. Hezbollah and Iran's insistence on this demand is part of an effort to defer negotiations about key points of disagreement between Iran and the United States, particularly Iranian efforts to control the Strait of Hormuz, and strengthen Iran's negotiating position vis-à-vis the United States.
2. Hezbollah and Iranian leaders are unified in viewing Israeli capitulation in Lebanon as inextricable from Iranian negotiations with the United States. Hezbollah Secretary General Naim Qassem acknowledged Iran's role in pushing for a complete ceasefire in Lebanon and noted that Iran's push for a complete ceasefire is an "integral part" of Iran's own efforts against the United States.
3. Iranian officials have continued to emphasize the Lebanon issue in order to try to deflect focus away from key points of disagreement in the US-Iran negotiations, particularly the Strait of Hormuz and Iran's nuclear program, which the regime seeks to avoid making concessions on. A newspaper linked to the Supreme Leader's office argued on June 2 that the status of the Strait of Hormuz will not return to its pre-war status. This comment reflects how the Iranian regime does not solely seek to survive this war and return to the pre-war status quo; the regime has positive objectives that it seeks to achieve, including securing Iranian sovereignty over the strait.
4. The Iraqi federal government has begun to try to restrict arms to the state through the disarmament and integration of Iranian-backed Iraqi militias into the Iraqi security establishment, including the Iranian-backed Popular Mobilization Forces (PMF).
5. Iraqi Prime Minister Ali al Zaydi is also reportedly pursuing a plan, approved by unidentified framework leaders, in which disarmed militia members would integrate into other Iraqi security institutions, such as the Counter Terrorism Service (CTS). Any Iraqi federal government attempt to disarm the militias and integrate them into the Iraqi security establishment that does not address the militias' networks and allegiance to Iran will likely further embed Iranian influence within the Iraqi state.

Toplines

Hezbollah and Iranian leaders continue to reject any ceasefire framework in Lebanon that does not meet their maximalist demand for total Israeli capitulation in Lebanon. Hezbollah and Iran's insistence on this demand is part of an effort to defer negotiations about key points of disagreement between Iran and the United States, particularly Iranian efforts to control the Strait of Hormuz, and strengthen Iran's negotiating position vis-à-vis the United States. The United States, Israel, and Lebanon issued a joint statement on June 3 agreeing to implement a ceasefire contingent upon Hezbollah's agreement to halt all attacks and evacuate its fighters south of the Litani River.[1] The joint statement indicates that Israel, Lebanon, and the United States seek to develop a framework to achieve their respective long-term objectives in Lebanon.[2] The statement announced that Israel and Lebanon would coordinate to establish "pilot zones" in southern Lebanon. The Lebanese Armed Forces (LAF) would deploy to these zones "to the exclusion of all non-state actors." [3] The Lebanese government confirmed that the LAF has begun deploying to southern Lebanese territory that the Israel Defense Forces (IDF) seized during ground operations against Hezbollah.[4] Lebanese President Joseph Aoun called the joint statement the "last opportunity" to obtain "a final and comprehensive ceasefire" in Lebanon on June 4.[5] Israeli Ambassador to the United States Yechiel Leiter separately said on June 4 that a ceasefire in Lebanon would be contingent upon Hezbollah's "complete dismantling." [6] Hezbollah rejected the joint statement's condition that the group cease attacks and withdraw to north of the Litani River.[7] Hezbollah Secretary General Naim Qassem said on June 4 that Hezbollah's accession to the joint statement would constitute surrender and instead reiterated the group's long-standing demands for a "comprehensive ceasefire" that would require Israel to cease all military operations and withdraw from Lebanon.[8] Qassem indicated that Hezbollah will continue its attacks until Israel accedes to the group's demands.[9] These demands constitute total Israeli capitulation in Lebanon because agreeing to them would force Israel to abandon its core political objective for operations in Lebanon, which is to dismantle Hezbollah as a militant group.[10]

Hezbollah and Iranian leaders are unified in viewing Israeli capitulation in Lebanon as inextricable from Iranian negotiations with the United States. Qassem acknowledged Iran's role in pushing for a complete ceasefire in Lebanon and noted that Iran's push for a complete ceasefire is an "integral part" of Iran's own efforts against the United States.[11] Islamic Revolutionary Guards Corps (IRGC) Quds Force Commander Brigadier General Esmail Ghaani also called for a full ceasefire in Lebanon and complete withdrawal of Israeli forces from Lebanon on June 4.[12] The IRGC similarly stated on June 4 that a ceasefire on "all fronts" was Iran's "initial condition" for the US-Iran ceasefire, which went into effect in early April.[13] Senior Iranian officials, including former IRGC Commander and current IRGC Baghiyatollah Sociocultural Headquarters Commander Major General Mohammad Ali Jafari, previously described a ceasefire in Lebanon as a precondition for negotiations with the United States.[14] Iranian officials have re-emphasized this issue in recent days amid the deadlock in US-Iran negotiations over Iran's nuclear program and the status of the Strait of Hormuz, however.[15]

Iranian officials have continued to emphasize the Lebanon issue in order to try to deflect focus away from key points of disagreement in the US-Iran negotiations, particularly the Strait of Hormuz and Iran's nuclear program, which the regime seeks to avoid making concessions on. The United States and Iran do not currently appear to be discussing Iran's nuclear program, given that Iran suspended negotiations until a complete ceasefire in Lebanon is reached.[16] ISW-CTP previously noted that a protracted discussion about Lebanon deflects from negotiations over Iran's highly enriched uranium stockpile and ability to enrich uranium. Iranian officials and media have also not commented on US demands regarding Iran's nuclear program in recent days. Iranian officials and media continue to insist that Iran will not cede control of the Strait of Hormuz, however. A newspaper

published on the Supreme Leader's website, Voice of Iran, published an op-ed on June 2 claiming that Iran has the "winning cards" in negotiations over the strait and that the status of the strait will not return to pre-war conditions.[17] This comment reflects how the Iranian regime does not solely seek to survive this war and return to the pre-war status quo; the regime has positive objectives that it seeks to achieve, including securing Iranian sovereignty over the strait.[18]

Iran has continued to try to justify its control over the Strait of Hormuz by attempting to give its illegal actions in the strait a veneer of legality. Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi claimed that Iran is complying with the UN Convention on the Law of the Sea (UNCLOS) because Iran is offering "services" and "protection" to vessels in Iranian waters in an interview with Iranian media on June 4.[19] The "protection" that Iran is "offering" vessels is protection from Iranian attacks, which means that Iran has effectively established a protection racket in the strait. Iran has repeatedly used force, including attacks on commercial vessels and naval mines, to make vessels sail through Iranian territorial waters. Iranian officials then claim that Iran has the right to extract a fee from these vessels.[20]

Iran also continues to demand other preconditions for negotiations, such as immediate economic relief upon the signing of any US-Iran memorandum of understanding (MOU). ISW-CTP previously assessed that, even if Iran's maximalist demands in Lebanon are met, Iran could condition further negotiations with the United States on additional US concessions.[21] Gharibabadi told Iranian media on June 4 that Iran still seeks the immediate release of at least half of its frozen assets upon the signing of an MoU and the second half in the subsequent negotiating period in his interview with Iranian media on June 4.[22]

Iran additionally continues to seek to erode US regional influence by trying to strain relations between the United States and the Gulf countries. Supreme Leader Mojtaba Khamenei claimed on June 4 that the war has caused a "tangible divergence of countries from" the United States, possibly in reference to the Gulf states.[23] Mojtaba previously claimed in late April that US bases in the region cannot defend the United States' Gulf partners, also likely as part of an effort to sow divisions between the United States and its Gulf partners and push Gulf countries to expel US forces from their territory.[24] Iran has continued to launch missile and drone attacks targeting the Gulf states following the ceasefire in April, most recently Kuwait and Bahrain on June 2.[25]

The Iraqi federal government has begun to try to restrict arms to the state through the disarmament and integration of Iranian-backed Iraqi militias into the Iraqi security establishment, including the Iranian-backed 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.[26] Iraqi Shia nationalist cleric Muqtada al Sadr's "deputy for jihad affairs" formally handed over the flag of Sadr's militia, Saraya al Salam, to representatives of the federal government's committee in charge of restricting arms to the state on June 4.[27] Sadr announced on May 27 the dissolution of Saraya al Salam and the "full integration" of the militia's members into the Iraqi state.[28] The Iraqi Joint Operations Command deputy commander, who heads the federal government's disarmament committee, said that the "mechanism" linking Saraya al Salam to the PMF will be abolished and that the militia will be "directly linked" to the prime minister, presumably after it is integrated into the PMF.[29] Saraya al Salam controls the 313th, 314th, and 315th PMF brigades.[30] The federal government committee also includes representatives from the defense and interior ministries and the PMF and is responsible for developing "mechanisms, technical contexts, and arrangements related to weapons and restructuring, leading to [the] full integration" of militia members into the Iraqi security establishment.[31] Iraqi Prime Minister Ali al Zaydi's spokesperson said on June 3 that the government's efforts to restrict arms to the state apply to all armed groups operating outside of the PMF.[32] A Shia

Coordination Framework member also said on June 3 that the federal government has formed joint committees with militias to develop inventories of militia weapons and supervise the handover of operations to the PMF.[33] Zaydi held separate meetings with delegations from Asaib Ahl al Haq and Kataib al Imam Ali on June 3 to discuss disarmament.[34] Both militias announced their readiness to restrict arms to the state on June 2.[35]

Zaydi is also reportedly pursuing a plan, approved by unidentified framework leaders, in which disarmed militia members would integrate into other Iraqi security institutions, such as the Counter Terrorism Service (CTS).[36] Informed sources told Iraqi media on June 4 that Zaydi presented US officials with a proposal to gradually disarm Iranian-backed Iraqi militias in exchange for US investment in Iraq.[37] Zaydi's plan reportedly includes granting jobs in formal security institutions, including CTS, to 35,000 militia members who disarm.[38] Saraya al Salam members would fill 15,000 of these positions, according to the informed sources.[39] Unidentified framework leaders reportedly approved this plan and agreed that officials from the defense and interior ministries would be "involved" in overseeing the federal government's disarmament efforts.[40] The framework is a loose coalition of Iraqi Shia political parties, some of which Iran backs, and it is unclear which specific elements of the framework supported this plan. Asaib Ahl al Haq head Qais al Khazali and Kataib al Imam Ali head Shibl al Zaidi, who are both framework members, almost certainly supported the plan, however. The informed sources added to Iraqi media that the political wings of multiple Iraqi militias have threatened to leave the framework and boycott the Iraqi political process if the framework proceeds with US pressure to disarm the militias and dissolve or integrate the PMF.[41]

Multiple Iranian-backed Iraqi militias, including Kataib Hezbollah-whose political wing is part of the framework, continue to reject disarmament. A Harakat Hezbollah al Nujaba official said on June 3 that the Islamic Resistance in Iraq refuses to disarm.[42] The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, includes Harakat Hezbollah al Nujaba, Kataib Hezbollah, Kataib Sayyid al Shuhada, and Ansar Allah al Awfiya.[43] These militias have, both historically and during the war, been the most kinetically active and are more subordinate to Iran than other Iraqi militias.[44] Kataib Hezbollah said on June 4 that it would not disarm until foreign troops in Iraq, almost certainly in reference to US and Turkish forces, withdraw and foreign interference in Yemen ends.[45] Kataib Hezbollah added that it would only surrender its weapons to the "Imam Mahdi." [46] The Imam Mahdi is the twelfth and final Imam in Shia Islam, who, according to Twelver Shia, is hiding and will reveal himself in the future.[47] Kataib Hezbollah also said that militias that have agreed to disarm have already severed their ties to Iran, stopped obeying Iran's orders, and stopped conducting attacks against the "adversary," in reference to Asaib Ahl al Haq and Kataib al Imam Ali.[48] Iraq analysts have long noted that Asaib Ahl al Haq's leadership, particularly its head Qais al Khazali, has focused more on politics than kinetic activity in recent years, including during the October 7 War.[49] Kataib Hezbollah and Harakat Hezbollah al Nujaba criticized Asaib Ahl al Haq in November 2023 for failing to conduct attacks against US forces in Iraq and Syria.[50] The US Treasury Department noted in April 2026, however, that Asaib Ahl al Haq fighters had conducted drone attacks targeting US and coalition forces in northern Iraq in March 2026.[51] Kataib Sayyid al Shuhada separately said on June 3 that it would not disarm until US forces leave Iraq.[52] Likely Kataib Sayyid al Shuhada front group Saraya Awliya al Dam conditioned its disarmament on the Iraqi federal government fulfilling a large list of demands that include ending all financial and economic dependence that "restricts Iraqi sovereignty" and securing modern air defense and radar systems.[53]

Any Iraqi federal government attempt to disarm the militias and integrate them into the Iraqi security establishment that does not address the militias' networks and allegiance to Iran will likely further embed Iranian influence within the Iraqi state. Some Iraqi officials have discussed reorganizing militia forces within Iraqi security institutions but have not specified how they

plan to do so.[54] Zaydi's spokesperson said on June 3 that the government's effort to "disengage" militias from the PMF refers to "reorganizing these forces within the security institutions" in a way that preserves militia members' rights and legal protections, for example.[55] It is unclear if the Iraqi federal government plans to integrate the militias into Iraqi security institutions as units or individuals. Militia-controlled PMF brigades could be reflagged as new units, which would largely retain the units' composition, networks, and structure. Integrating the militias into the PMF or other Iraqi security institutions as reflagged units would further entrench the militias into the Iraqi state's security sector, which would enable deeper Iranian infiltration. Zaydi's spokesperson also said that the first step toward restricting arms to the state is "realigning" the forces, likely in reference to Iranian-backed Iraqi militia members who operate outside of militia-controlled PMF brigades, and ensuring that the "forces" only respond to the prime minister.[56]

Failing to properly address the militias' networks and loyalty to Iran during their disarmament and integration into the Iraqi security establishment would also likely pose a threat to the institutions that the militia members would reportedly join, assuming the details of Zaydi's proposal are accurate. The replacement of most of CTS's top leadership during former Prime Minister Mohammad Shia al Sudani's administration has led to worsening corruption and militia infiltration of what most analysts consider to be Iraq's most effective security service.[57] The risk posed by militia infiltration of Iraq's security services is especially great, given the extent to which the United States funds the Iraqi security establishment.[58] CTS gave a Kataib Hezbollah-owned company \$12 million USD in its 2023 budget, for example.[59]

The Badr Organization denied on June 3 that the framework and Badr Organization head Hadi al Ameri had formed a committee to restrict arms to the Iraqi state.[60] Iraqi and regional reporting noted in early May that the committee, which included Ameri, Zaydi, and Sudani, had been preparing a plan to disarm the militias.[61] Iraqi media previously reported that the framework chose Ameri for the committee because his ties to Iran were meant to "help build trust with the militias and persuade them to engage with the state." [62] Badr has integrated itself into Iraqi state institutions to a greater extent than other Iranian-backed Iraqi militias since 2003.[63] Badr would likely face economic blowback to a greater extent than other militias if the United States imposed sanctions or other financial pressure on the Iraqi federal government over failing to address the militias, given the extent of Badr's dealings with the Iraqi state. Ameri may have denied the committee's existence in response to backlash from more ideologically hardline elements of the Badr Organization.

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Israeli Prime Minister Benjamin Netanyahu convened a meeting of senior Israeli political and military leaders to discuss how to respond to Hezbollah's attack on northern Israel on June 3.[64] An Israeli military correspondent said that the IDF briefed political leaders on a planned "large-scale" military operation in Lebanon, although the correspondent did not provide details about the operation.[65] Hezbollah's June 3 rocket attack on Israeli soldiers near the Israel-Lebanon border was Hezbollah's first attack on Israeli territory since US President Donald Trump announced on June 1 that Israel would not attack Hezbollah targets in Beirut and Hezbollah would halt attacks against Israel.[66] It is unclear whether this meeting happened before or after Israel agreed to the June 3 joint statement.

Other Axis of Resistance Activity

See topline section.

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Iran Update Special Report, June 5, 2026



Parker Hempel, Ria Reddy, Ben Rezaei, Nidal Morrison, 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. Hezbollah and Iranian leaders continue to reject any ceasefire framework in Lebanon that does not meet their maximalist demand for total Israeli capitulation in Lebanon. Hezbollah and Iran's maximalist demands seek to undermine US and Lebanese government efforts to end the conflict with Israel and restrict weapons to the Lebanese state.
2. Iran and Hezbollah continue to link Israeli capitulation in Lebanon to US-Iran negotiations to try to delay discussions about key points of disagreement between the United States and Iran, particularly Iran's nuclear program and its efforts to control the Strait of Hormuz.
3. Iranian officials and media are highlighting the growing ties between the UAE and Israel, likely to try to exploit anti-Israel sentiment among Gulf states to drive a wedge between the UAE and its Gulf neighbors.

Toplines

Hezbollah and Iranian leaders continue to reject any ceasefire framework in Lebanon that does not meet their maximalist demand for total Israeli capitulation in Lebanon. Hezbollah officials and allies have continued to reiterate their maximalist demand for a complete ceasefire in Lebanon that would require Israel to cease all military operations and withdraw from Lebanon.[1] Lebanese Parliament Speaker and Hezbollah ally Nabih Berri stated on June 5 that he would agree to Hezbollah's withdrawal from southern Lebanon if Israeli troops withdrew from the territory they hold in Lebanon and Israel agreed to a "complete and comprehensive ceasefire without conditions." [2] Berri stated that the June 3 US-Israel-Lebanon agreement is "unjust" and "unworthy of discussion," which echoes Hezbollah's rejection of the agreement.[3] The United States, Israel, and Lebanon agreed on June 3 to implement a ceasefire in Lebanon contingent upon Hezbollah's agreement to halt all attacks and evacuate its fighters south of the Litani River. The Israel Defense Forces (IDF) would halt strikes targeting the group after Hezbollah ceased attacks against Israel and withdrew its forces from south of the

Litani.[4] The US and Lebanese governments previously proposed on June 2 that a ceasefire between the IDF and Hezbollah would be geographically limited, with the IDF halting strikes against Beirut in exchange for Hezbollah halting all attacks on Israeli territory.[5] The June 3 agreement did not specify the geographic scope of the proposed ceasefire.[6] Hezbollah and Iranian officials have repeatedly insisted that an acceptable ceasefire must require Israel to halt attacks across Lebanon and withdraw from Lebanese territory.[7] Iranian Foreign Affairs Minister Abbas Araghchi told Hezbollah-affiliated media on June 3 that the IDF must withdraw from territories it has “occupied” in Lebanon as part of an end to the war.[8]

Hezbollah and Iran’s maximalist demands seek to undermine US and Lebanese government efforts to end the conflict with Israel and restrict weapons to the Lebanese state. Hezbollah and Iran have repeatedly rejected ceasefire proposals mediated and supported by the United States and the Lebanese government, which has complicated ongoing US-mediated Israel-Lebanon negotiations.[9] Lebanese President Joseph Aoun and Prime Minister Nawaf Salam stated on June 5 that Iran is using Lebanon as a bargaining chip in US-Iran negotiations.[10] Salam emphasized that the conflict in Lebanon is “not being fought for us, but on our land and at the expense of our people.”[11] The June 3 US-Israel-Lebanon joint statement suggests that these parties seek to develop a framework to achieve their respective long-term objectives in Lebanon, including ending the conflict in Lebanon and disarming Hezbollah so that weapons are restricted to the Lebanese state.[12] Aoun stated that current Israel-Lebanon negotiations are “tough,” but that the most recent US-Israel-Lebanon joint statement could be a path forward for “lasting peace.”[13]

Iran and Hezbollah continue to link Israeli capitulation in Lebanon to US-Iran negotiations to try to delay discussions about key points of disagreement between the United States and Iran, particularly Iran’s nuclear program and its efforts to control the Strait of Hormuz. Araghchi told Hezbollah-affiliated media on June 3 that the US-Iran war will not end until the war in Lebanon ends.[14] Supreme Leader Military Adviser Mohsen Rezaei similarly stated on June 5 that Lebanon is an “inseparable part” of any US-Iran agreement or ceasefire.[15] ISW-CTP previously assessed that Iran is likely trying to use prolonged discussions about a ceasefire in Lebanon to divert attention from negotiations over its nuclear program and activities in the Strait of Hormuz.[16] Iranian officials have repeatedly insisted that Iran will not negotiate on its nuclear program until the United States accepts an initial agreement that includes a complete ceasefire in Lebanon, among other Iranian preconditions.[17] These preconditions likely seek to reduce US leverage ahead of any future nuclear negotiations, which would make it more difficult for the United States to extract nuclear concessions from Iran. Iranian officials have shown no willingness to meet US demands regarding Iran’s highly enriched uranium stockpile or enrichment activities.[18] Iran is similarly using the Lebanon issue to shift attention away from its efforts to expand and legitimize its control over the Strait of Hormuz. Iran continues to try to legitimize its illegal actions in the strait and pursue long-term control over this critical waterway, which is detrimental to US and Gulf interests.[19]

Iranian officials and media are highlighting the growing ties between the UAE and Israel, likely to try to exploit anti-Israel sentiment among Gulf states to drive a wedge between the UAE and its Gulf neighbors. Islamic Revolutionary Guards Corps (IRGC)-affiliated outlet Tasnim News Agency, citing a senior source in the Axis of Resistance, claimed that senior UAE official Anwar Gargash has secretly cooperated with Israeli intelligence services, including Mossad.[20] Tasnim claimed that Mossad shaped Gargash’s positions and agenda through a series of meetings, likely referring to Gargash’s recent statements advocating for a more aggressive stance toward Iran.[21] Gargash stated in March 2026 that the UAE’s “main concentration is...the Iranian threat on [the UAE’s] security” and has repeatedly argued that Gulf states cannot accept a future defined by persistent Iranian missile and nuclear threats.[22] Gargash’s statements followed repeated Iranian attacks on Gulf countries during the

war and Iranian efforts to control the strait. Iranian Foreign Affairs Minister Abbas Araghchi similarly emphasized the UAE's relationship with Israel on June 5 and stated that the UAE has established close ties with Israel.[23] Araghchi stated that the UAE would have had a better relationship with Iran if it had pursued a policy more similar to that of other Gulf states.[24] Araghchi may have been implicitly warning other Gulf states against adopting the UAE's approach toward Israel and Iran. Iran targeted the UAE more than any other country during the recent war, and Araghchi's comments may have sought to warn other Gulf states that they can avoid similar Iranian retaliation by distancing themselves from Israel and refraining from adopting a more aggressive stance toward Iran.[25] The UAE and Israel have deepened bilateral ties since the UAE signed the Abraham Accords in 2020.[26] Israel's recognition of Somaliland—the first country to formally do so—in 2025 and its reported deployment of forces there further illustrate the growing alignment of Emirati and Israeli interests, given that the UAE and Somaliland share deep economic and defense ties.[27]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

A drone strike recently caused an explosion near the Mina al Fahal Port in Oman, according to people familiar with the matter speaking to Reuters.[28] Three unspecified sources said that oil loading was suspended at the port following the explosion.[29] Petroleum Development Oman stated on June 5 that operations at the port have resumed.[30]

US and Israeli Air Campaign

Israel reportedly deployed military and intelligence units to Azerbaijan during the recent war with Iran, according to unspecified sources speaking to CNN. This report could intensify long-standing Iranian concerns that Azerbaijan is facilitating Israeli operations against Iran. CNN reported on June 5 that Israel secretly deployed elite military and intelligence units to Azerbaijan as part of a network of covert sites across the Middle East to facilitate operations against Iran, according to four sources familiar with the matter.[31] The Azerbaijani Embassy in Washington denied CNN's report.[32] Israeli forces reportedly operated from several locations in southern Azerbaijan, which is adjacent to Iran's northern border and roughly 60 miles from Tabriz, East Azerbaijan Province.[33] CNN reported that the Israeli strike on March 4 that killed IRGC Intelligence Division head Rahman Mughaddam was launched from Azerbaijan.[34] Iran notably launched a drone attack targeting Nakhchivan International Airport in Azerbaijan a day after Mughaddam was killed.[35] Iran denied its involvement in the attack.[36] CNN added that Azerbaijan's State Security Service reported that it had disrupted an IRGC plot to attack critical infrastructure and Israeli and Jewish targets in Azerbaijan on March 6.[37] Iranian officials and regime-linked media have repeatedly accused Azerbaijan of allowing Israel to use Azerbaijani territory and airspace to conduct operations against Iran.[38] An Iranian hardline newspaper close to the supreme leader claimed in July 2025 that Israeli strikes on Tehran and Alborz provinces during the June 2025 Israel-Iran War came from the direction of the Caspian Sea and passed through Azerbaijani airspace, for example.[39]

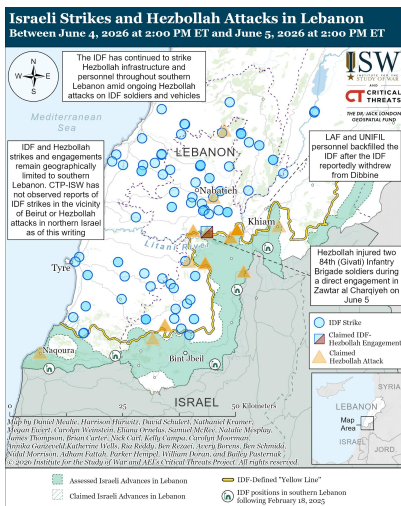
Iranian Domestic Affairs

Nothing significant to report.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The IDF and Hezbollah have continued to engage one another in southern Lebanon. The IDF has continued to strike Hezbollah infrastructure and personnel throughout southern Lebanon amid ongoing Hezbollah attacks on IDF soldiers and vehicles in southern Lebanon.[40] Hezbollah injured two 84th (Givati) Infantry Brigade (91st Division) soldiers during a direct engagement in Zawtar al Charqiyeh, Nabatieh District, on June 5.[41] A Hezbollah drone also severely injured an IDF officer in southern Lebanon on June 4.[42] IDF and Hezbollah strikes and engagements have remained geographically limited to southern Lebanon since ISW-CTP's last data cutoff on June 4. ISW-CTP has not observed any reports of IDF strikes on Hezbollah targets in the vicinity of Beirut or Hezbollah attacks in northern Israel at the time of this writing. The United States, Israel, and Lebanon announced on June 3 that Israel and Lebanon would coordinate to establish "pilot zones" in southern Lebanon.[43] The Lebanese Armed Forces (LAF) would deploy to these zones "to the exclusion of all non-state actors." [44] The Lebanese government confirmed on June 4 that the LAF has begun deploying to southern Lebanese territory that the IDF seized during ground operations against Hezbollah.[45] The Associated Press reported on June 5 that the LAF and United Nations Interim Force in Lebanon (UNIFIL) personnel backfilled IDF positions in Dibbine, Marjaayoun District, after the IDF withdrew from the town.[46]



Other Axis of Resistance Activity

Houthi Supreme Leader Abdulmalik al Houthi announced on June 4 that the Houthis are in "full coordination" with other Axis of Resistance members and will take "necessary" actions in response to recent developments in Lebanon and the Palestinian territories.[47] This statement is likely part of a broader Iranian and Axis of Resistance information operation to pressure the United States to convince Israel to halt its operations against Hezbollah by threatening to enter the conflict.[48] Iran and the Houthis have repeatedly threatened to resume attacks against shipping in the Bab el Mandeb Strait throughout the war, but have not acted on those threats, which suggests that their current threats are intended to achieve the effect of pressuring the United States to convince Israel to halt its operations against Hezbollah.[49]

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Iran Update Special Report, June 6, 2026



Ben Rezaei, Parker Hempel, Nidal Morrison, Carolyn Moorman, Kelly Campa, 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. Iranian officials and media continue to demand US guarantees and concessions ahead of any US-Iran deal, likely to reduce US leverage before any substantive negotiations over points of key disagreement between the United States and Iran, such as Iran's nuclear program and the Strait of Hormuz. The regime is seeking immediate economic relief as one of these preconditions.
2. Iran is continuing to leverage its support for Lebanon in order to delay substantive negotiations with the United States over its nuclear program and the strait. Iran has suspended negotiations until a complete ceasefire in Lebanon is reached.
3. Iran and the United States exchanged limited fire over the past 24 hours after the IRGC attempted to stop tankers from crossing the Strait of Hormuz. The IRGC Public Relations Office claimed on June 5 that four oil tankers attempted to violate Iran's illegal traffic separation scheme under US military "guidance."

Toplines

Iranian officials and media continue to demand US concessions ahead of any US-Iran deal, likely to reduce US leverage before any negotiations over points of key disagreement between the United States and Iran, particularly Iran's nuclear program and the Strait of Hormuz. The regime is seeking immediate economic relief as one of these preconditions. Iranian Armed Forces General Staff-run media Defa Press argued on June 6 that any future US-Iran agreement must include economic compensation for Iran and guarantees that would impose a "significant cost" on the United States if it withdraws from the agreement.[1] Iranian officials have often cited the US withdrawal from the Joint Comprehensive Plan of Action in 2018 as a reason to mistrust US commitments to any deal.[2] Defa Press argued that Iran must obtain tangible economic benefits as quickly as possible and that any Iranian commitments must occur "simultaneously" with unspecified tangible US concessions.[3] Parliamentary National Security and Foreign Policy Committee Member Brigadier General Esmail Kowsari

similarly said on June 6 that Iran has emphasized the need for compensation throughout the negotiations.[4] Supreme Leader Military Adviser and former Islamic Revolutionary Guards Corps (IRGC) Commander Major General Mohsen Rezaei told CNN on June 5 that any potential US-Iran peace deal hinges on the United States agreeing to release \$24 billion USD in frozen Iranian assets.[5] These statements are representative of the broader Iranian effort to secure US concessions before discussing key points of disagreement over which the regime seeks to avoid making concessions of its own, such as Iran's nuclear program or the Strait of Hormuz.[6] Iranian officials, such as IRGC Baghiyatollah Sociocultural Headquarters Commander and former IRGC commander Major General Mohammad Ali Jafari, have also demanded that the United States lift sanctions and recognize Iran's sovereignty over the Strait of Hormuz.[7]

Iran is also continuing to leverage its support for Lebanon in order to delay substantive negotiations with the United States over its nuclear program and the strait.[8] Lebanese President Joseph Aoun and Prime Minister Nawaf Salam accused Iran of using Lebanon as a “bargaining chip” in US-Iran negotiations.[9] Iranian Foreign Affairs Minister Abbas Araghchi rejected Aoun's remarks on June 6, even though Iranian officials have repeatedly linked a US-Iran agreement to a complete ceasefire in Lebanon.[10] Iran recently suspended negotiations until a complete ceasefire in Lebanon is reached.[11] IRGC-affiliated Mehr News again argued on June 6 that the regime sees Lebanon's security as tied to Iran's and that any efforts to end the war with Iran must include Lebanon.[12]

Iran has continued to use force to impose its illegal traffic separation scheme, which is prompting US responses to prevent Iran from using force to impose its illegal traffic separation scheme. The IRGC Public Relations Office claimed on June 5 that four oil tankers attempted to violate Iran's illegal traffic separation scheme under US military “guidance.”[13] It is unclear at this time which vessels Iran targeted or where, but US forces have coordinated the passage of over 100 commercial vessels through the strait over the past month, according to an unspecified US official.[14] The IRGC Navy “targeted” one vessel with unspecified weapons, and Iranian forces also fired “warning shots” at unspecified “US ships” near Larak Island, according to Iranian state media.[15] US Central Command (CENTCOM) confirmed that it shot down four Iranian drones targeting maritime traffic in the strait.[16] CENTCOM struck Iranian surveillance radar sites on Qeshm Island and in Goruk, Hormozgan Province, in response to the Iranian attacks on commercial vessels.[17] Strikes against these surveillance targets would presumably make it more difficult for Iran to attack commercial shipping in the strait. Iranian forces then launched several missiles targeting US bases in Bahrain and Kuwait on June 5.[18] It is not immediately clear why Iran targeted these specific bases. Kuwaiti forces intercepted seven Iranian missiles, while the Bahraini forces intercepted three missiles and several drones.[19] No casualties were reported.



US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Fighting between the Israel Defense Forces (IDF) and Hezbollah has remained limited to southern Lebanon since ISW-CTP's last data cutoff on June 5. The IDF has continued to strike Hezbollah infrastructure and personnel throughout southern Lebanon amid ongoing Hezbollah attacks on IDF soldiers and vehicles in southern Lebanon.[20] Hezbollah claimed one fixed-wing drone attack on an IDF border position on June 6 in Yiftach, northern Israel, on June 6.[21] The IDF reported that it identified and intercepted four Hezbollah drones over southern Lebanon, but has not reported any Hezbollah strikes on Israeli territory at the time of this writing, suggesting that the IDF intercepted the Hezbollah drone or it failed mid-flight.[22] Israeli officials have warned that Hezbollah strikes on Israel would prompt Israeli strikes on Hezbollah's stronghold in Beirut's southern suburbs.[23] ISW-CTP has also not observed any IDF strikes in the vicinity of Beirut since June 5.

The IDF struck a Lebanese Armed Forces (LAF) vehicle and killed three soldiers, including a LAF brigadier general, in southern Lebanon on June 6.[24] The IDF said that it identified a vehicle "moving suspiciously" toward Israeli forces near Kfar Tebnit in Nabatieh District. The IDF described Kfar Tebnit as an area in which Hezbollah is operating that it considers to be an active combat zone and under evacuation orders.[25] The IDF said that movement in the area requires coordination with the IDF and denied that it intentionally targeted the LAF.[26] The LAF and Lebanese officials, including President Joseph Aoun, Prime Minister Nawaf Salam, and Parliament Speaker Nabih Berri, condemned the IDF strike.[27]

Other Axis of Resistance Activity

Nothing significant to report.

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