

Iran Update Special Report, June 14, 2026



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Analyst Notes: Data Cutoff: 6:00 PM ET

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

Key Takeaways

1. The United States and Iran reached an agreement on June 14 that apparently calls for a ceasefire on all fronts, Iran to “open” the Strait of Hormuz, and the United States to lift its naval blockade on Iranian ports. The United States and Iran will sign the agreement in Geneva on June 19.
2. The exact terms of the MoU are not publicly available as of this writing, which makes it difficult to assess how Iran views the agreement in terms of achieving Iranian objectives. Iranian officials have not yet commented on whether Iran would re-open the strait without tolls. It is not clear if a “toll-free” and “open” strait means that Iran retains any of its management functions over the strait. Iran has repeatedly emphasized that the strait is under Iranian control and that the strait is part of Iran’s broader deterrence strategy.
3. An Israeli attack in southern Beirut prompted a flurry of diplomatic efforts to reach an agreement amid Iranian threats that it would respond by attacking Israel. Several Iranian military and security officials warned on June 14 that Iran would respond to the Israeli attack. Three Iranian officials said that Iran called off a planned attack on Israel after Trump urged restraint.

Toplines

The United States and Iran reached an agreement on June 14 that apparently calls for a ceasefire on all fronts, Iran to “open” the Strait of Hormuz, and the United States to lift its naval blockade on Iranian ports.[1] US President Donald Trump announced on Truth Social that he “fully authorize[s] the toll-free opening of the Strait of Hormuz” and “authorize[s] the immediate removal of the United States Naval blockade.”[2] Iran’s top national security decision-making body, the Supreme National Security Council (SNSC), and Deputy Foreign Affairs Minister Kazem Gharibabadi announced that Iranian officials agreed to a final draft of the memorandum of understanding (MOU) after 15 hours of meetings with Qatari officials.[3] The SNSC and Gharibabadi confirmed the ceasefire on all fronts and that the United States will lift its blockade, but notably did not comment on whether Iran would re-open

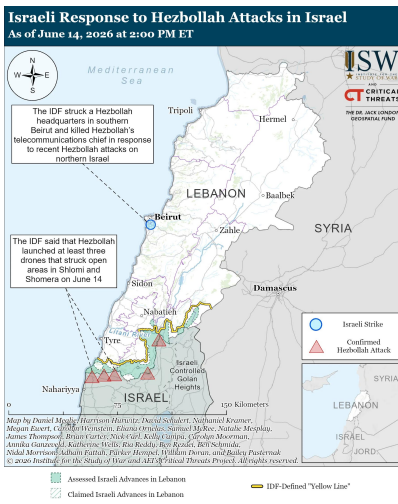
the strait without tolls.[4] Both Trump and Gharibabadi said that the United States and Iran will sign the agreement with the other parties in Switzerland on June 19.[5] Gharibabadi said that both parties will discuss “termination of all sanctions” on Iran, the nuclear issue, and “economic reconstruction and development” in Iran in the 60 days after the agreement is signed.[6] Pakistani Prime Minister Shehbaz Sharif noted that the mediators will conduct several meetings this week ahead of the signing ceremony and to “lay the foundation for technical talks.”[7]

The exact terms of the MoU are not publicly available as of this writing, which makes it difficult to assess how Iran views the agreement in terms of achieving Iranian objectives.

Iran’s strategic objectives at this time include solidifying control over the Strait of Hormuz and bolstering the Axis of Resistance. It is not clear if a “toll-free” and “open” strait means that Iran retains any of its management functions over the strait. Iranian Foreign Affairs Minister Abbas Araghchi has, for example, said that Iran is committed to a “toll-free” strait but will still impose fees.[8] It is unclear if Iran will keep regulating traffic or its coercive activities in the strait, or if Iran made commitments not to disrupt shipping through the strait in the future. Iran has repeatedly emphasized that the strait is under Iranian and Omani control and that the strait is an important leverage in Iran’s broader deterrence strategy.[9] Iranian statements regarding the contents of previous MOU drafts indicate that some terms of the agreement are at odds with stated US positions on the Strait of Hormuz in recent months, especially with regard to what constitutes an “open strait.”[10] An “open” strait under Iranian management is not a return to the pre-war status quo and would mean that Iran has accomplished a key war aim.

An Israeli attack in southern Beirut prompted a flurry of diplomatic efforts to reach an agreement amid Iranian threats that it would respond by attacking Israel.[11] The IDF struck a Hezbollah headquarters in Dahiyeh, Hezbollah’s stronghold in Beirut’s southern suburbs, and killed Hezbollah’s telecommunications chief on June 14.[12] Israel conducted the attack in response to several recent Hezbollah drone attacks that landed in northern Israel.[13] Israel has repeatedly warned since June 1 that it would strike Hezbollah targets in Beirut’s vicinity if Hezbollah conducted attacks in northern Israel.[14] Hezbollah likely continued to attack northern Israel despite Israeli threats in order to impose costs on Israel for its current presence in southern Lebanon and force an IDF withdrawal. Hezbollah has historically used attacks targeting northern Israel as a means through which it can impose costs and influence Israeli decision-making. This tactic, along with attacks targeting Israeli soldiers in southern Lebanon, was a key element of Hezbollah’s efforts to force Israel’s withdrawal from Lebanon in 2000.[15] Iran, in turn, has pledged to respond to any Israeli attack on Dahiyeh with Iranian strikes on Israel in order to deter Israeli attacks that could degrade Hezbollah.[16]

Several Iranian military and security officials warned on June 14 that Iran would respond to the Israeli attack, including Islamic Revolutionary Guards Corps (IRGC) Quds Force Commander Esmail Ghaani, Supreme National Security Council Secretary Brigadier General Mohammad Bagher Zolghadr, and the Khatam ol Anbia Central Headquarters Deputy Coordinator Brigadier General Mohammad Jafar Asadi.[17] US President Donald Trump said that he asked Iran not to launch any attacks on Israel.[18] Three Iranian officials told the *New York Times* that Iran called off a planned attack on Israel after Trump urged restraint.[19] Gharibabadi claimed that Iranian threats led to Iran achieving some of its requested “reforms” to the current agreement.[20]



An Iranian strike on Israel would have been part of the regime’s broader effort to uphold Iranian deterrence against Israel and preserve Hezbollah. IRGC Commander Major General Ahmad Vahidi, whom CTP-ISW currently assesses to be driving regime decision-making, has prioritized establishing Iranian deterrence with the United States and Israel since the beginning of the recent conflict.[21] The regime has used the threat of force— in addition to actual force—to attempt to establish a reality in which any Israeli or US attack on an Iranian proxy or partner would result in high costs for Israel and the United States. Iran has repeatedly threatened to attack Israel in the event that it strikes Hezbollah in Beirut’s southern suburbs. Iran launched about ten missiles targeting Israel on June 7 in response to an Israeli strike.[22] Vahidi specifically advocated for these strikes against “more moderate voices,” according to Iranian and Arab officials speaking to the *Wall Street Journal*. [23] Vahidi was also reportedly the actor who sought to link operations in Lebanon to the broader US-Israel-Iran war in negotiations.[24]

The Iranian regime attempted to build consensus among regime factions over the MOU ahead of the announcement of a deal. Iran’s anti-negotiations camp, led by ultrahardliner faction Paydari (Stability) Front, continued to vocalize their opposition to against any form of negotiations with the United States on June 14.[25] Some Iranians even conducted small-scale peaceful protests in Iranian cities against negotiations, including by chanting for Araghchi’s resignation outside of the foreign ministry in Tehran.[26] Araghchi appears aligned with Vahidi—unlike the situation in April 2026, when Araghchi was not—and so the protests appear to be driven solely by the ultra-hardline camp. Several Iranian political officials and regime outlets emphasized national cohesion and support for regime decision-making in their messaging on June 13 and 14.[27] Iranian President Masoud Pezeshkian warned that negotiating with the United States does not mean that the regime is abandoning its principles.[28] IRGC-affiliated Fars News also asked Iranian citizens to support the regime and negotiating team.[29]

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

The IDF killed senior Hezbollah leader and Radwan Force commander Ali Musa Daqduq on June 13, who was a senior commander with deep experience working with multiple Axis of Resistance partners and the IRGC Quds Force.[30] The IDF announced on June 14 that its forces killed Daqduq in southern Lebanon on June 13.[31] The IDF said that, in addition to being commander of the Radwan Forces, Daqduq also commanded the operations department of Hezbollah's Nasr Unit, which means that he planned Hezbollah operations in the eastern section of southern Lebanon.[32] Daqduq also led Hezbollah forces operating along the Israel-Syria border during the Assad era.[33]

Daqduq had extensive regional experience and connections with the IRGC Quds Force, and his death will limit Hezbollah's already dwindling bench of senior commanders with experience supporting operations in other theaters. Senior Hezbollah cadre have long augmented IRGC Quds Force operatives in theaters like Iraq, Yemen, and Syria to train other Iranian-backed militias. Many of the commanders who were involved in these efforts have been killed since 2024. Daqduq advised and trained the Iranian-backed Iraqi Special Groups in Iran from 2006 to 2007.[34] In this role, Daqduq participated in the planning of an Iranian-backed Iraqi militia Asaib Ahl al Haq attack in which Asaib Ahl al Haq killed five US soldiers.[35] US forces imprisoned Daqduq for his role in the attack.[36] The Iraqi judiciary acquitted Daqduq and ordered his release in 2012.[37]

Other Axis of Resistance Activity

Nothing significant to report.

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Endnotes

[1] <https://truthsocial.com/@realDonaldTrump/116750587569914985>;
<https://x.com/CMShehbaz/status/2066268332832194810?s=20>

[2] <https://truthsocial.com/@realDonaldTrump/116750587569914985>

[3] <https://www.tasnimnews dot ir/fa/news/1405/03/25/3617286>;
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[4] https://x.com/shoaam_ir/status/2066293795897925979?s=20; <https://www.tasnimnews dot>

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[5] <https://www.tasnimnews dot ir/fa/news/1405/03/25/3617286;>
<https://truthsocial.com/@realDonaldTrump/posts/116750814874397998>

[6] <https://www.tasnimnews dot ir/fa/news/1405/03/25/3617286>

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[8] [https://understandingwar.org/research/middle-east/iran-update-special-report-june-13-2026/;](https://understandingwar.org/research/middle-east/iran-update-special-report-june-13-2026/)
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[9] <https://understandingwar.org/research/middle-east/iran-update-special-report-june-11-2026/>

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[13] [https://x.com/D_3141592_R/status/2066112181477781960?s=20;](https://x.com/D_3141592_R/status/2066112181477781960?s=20)
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[14] [https://understandingwar.org/research/middle-east/iran-update-special-report-june-8-2026/ ;](https://understandingwar.org/research/middle-east/iran-update-special-report-june-8-2026/)
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- [21] <https://www.criticalthreats.org/analysis/iran-update-evening-special-report-june-10-2026>
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- [30] <https://x.com/idfonline/status/2066184365952966726> ; <https://t.me/MTVLebanoNews/74374>
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- [32] <https://x.com/idfonline/status/2066184365952966726> ; <https://israel-alma dot org/sectors-of-hezbollahs-geographical-units-in-southern-lebanon/>
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<https://www.nbcnews.com/politics/israel-kills-hezbollah-leader-planned-elaborate-attack-us-soldiers-ira-rcna181315>

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<https://www.nbcnews.com/politics/israel-kills-hezbollah-leader-planned-elaborate-attack-us-soldiers-ira-rcna181315>

Iran Update Special Report, June 15, 2026



Ria Reddy, Benjamin Schmida, 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. US and Iranian sources have expressed diverging interpretations of some key aspects of the recent US-Iran agreement. The full text of the agreement has not yet been published, which makes it difficult to ascertain which interpretations of the agreement are accurate.
2. Iran's interpretation of the agreement's provisions about the Strait of Hormuz would constitute a significant strategic victory for Iran if its interpretation became the recognized reality. Iranian statements indicate that the regime defines an "open" strait as one that remains under Iranian management, which conflicts with US and global commercial interests.
3. The reopening of the Strait of Hormuz depends on the risk calculus of shipping companies and captains. Continued Iranian threats against commercial shipping may have a negative impact on the willingness of companies and captains to resume transiting through the strait. Iran's mine-laying activities and threats to mine the strait are also a key component of this effort.
4. Hezbollah has signaled that it will adhere to the Lebanon ceasefire outlined in the US-Iran agreement and suggested that the group views the agreement as a precursor for Israel's withdrawal from Lebanon.
5. Israeli officials have stated that the IDF will continue to operate in Lebanon to degrade Hezbollah. Hezbollah and Iran could make their implementation of the US-Iran agreement contingent upon the cessation of Israeli operations against Hezbollah in order to push Israel to halt these operations.

Toplines

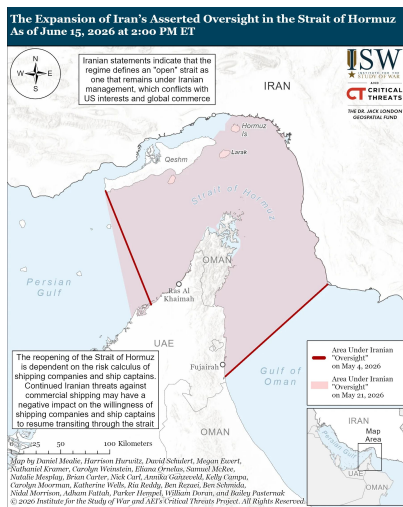
US and Iranian sources have expressed diverging interpretations of some key aspects of the recent US-Iran agreement. The full text of the agreement has not yet been published, which makes it difficult to ascertain which interpretations of the agreement are accurate. The United States and Iran reached an agreement on June 14 to end the war and are expected to formally sign the agreement in Geneva on June 19.[1] The agreement reportedly calls for a ceasefire on all fronts, requires

Iran to “open” the Strait of Hormuz, and requires the United States to lift its naval blockade on Iranian ports.[2] US and Iranian officials have stated that additional negotiations, including discussions over Iran’s nuclear program, will occur during the 60 days following the agreement’s signing.[3] US Vice President JD Vance stated on June 15 that the United States expects the strait to be open “in a toll-free way for the long term.”[4] Islamic Revolutionary Guards Corps (IRGC)-affiliated media, by contrast, reported on June 15 that Iran will pause imposing “fees” on vessels transiting through the strait for the next 60 days but intends to resume charging vessels “service fees” after the 60-day period.[5] Iranian officials have also continued to signal their intent to jointly manage the strait with Oman.[6] US officials have also denied Iranian claims that the agreement will immediately release a portion of Iran’s frozen assets and lift some sanctions. US officials, including US President Donald Trump and Vice President JD Vance, have instead insisted that sanctions relief and the release of Iranian assets are dependent on Iran’s implementation of the agreement.[7] IRGC-affiliated media argued that Iran must “strictly implement its interpretation” of the agreement and disregard the United States’ “nonsense interpretations,” which further highlights the apparent divergence between Iran and the United States’ understandings of the deal.[8] These diverging interpretations of key provisions in the agreement will likely complicate the implementation of the agreement and the next phase of negotiations.

Iran’s interpretation of the agreement’s provisions about the Strait of Hormuz would constitute a significant strategic victory for Iran if its interpretation becomes the recognized reality. Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on June 15 that Iran and Oman will manage traffic through the strait, provide maritime “services,” and collect related fees.[9] IRGC-affiliated media similarly claimed that the text of the US-Iran agreement was revised to emphasize Iranian and Omani sovereignty over the international waterway.[10] Iranian reports that Iran intends to resume “fee” collection in some capacity are consistent with repeated Iranian claims that these charges are “service fees” rather than transit tolls and therefore do not violate a “toll-free” arrangement.[11] Imposing tolls is one mechanism through which Iran exercises authority over the strait, but ISW-CTP previously assessed that Iran likely prioritizes securing recognized sovereignty over the strait over imposing a toll scheme in the strait.[12] The Iranian regime defines an “open” strait as one that remains under Iranian management, which conflicts with US and global commercial interests. Iranian officials have repeatedly identified control of the strait as a core strategic objective and a central pillar of Iran’s long-term deterrence posture.[13] ISW-CTP previously assessed that Iran likely views control over the strait as essential to restoring deterrence against the United States and Israel following the degradation of its other deterrent capabilities.[14] Any agreement that permits Iran to retain any form of authority over the strait, regardless of whether it imposes tolls or not, would allow Iran to reimpose restrictions in the international waterway at its discretion. Such authority would give Iran significant leverage over global commerce, which Iran could use to extract concessions and advance its strategic objectives.

The reopening of the Strait of Hormuz depends on the risk calculus of shipping companies and ship captains. Continued Iranian threats against commercial shipping may have a negative impact on the willingness of companies and captains to resume transiting through the strait. Trump stated on June 15 that vessels have begun transiting through the strait via the “southern highway,” almost certainly referring to the internationally recognized traffic separation scheme.[15] Shipping companies will likely remain reluctant to resume normal operations, at least for the time being, due to the ongoing risk of Iranian attacks and naval mines, however. The IRGC Navy announced on June 15 that it has not issued transit permits over the past 96 hours and emphasized that the strait remains closed to all vessels.[16] The IRGC Navy reportedly warned ships not to approach areas under Iranian control “until further notice,” which is an implicit threat to attack vessels that attempt to transit through the strait without Iranian permission.[17] These threats are part of a broader Iranian effort since March 2026 to use force to deter vessels from transiting the strait without Iranian authorization.[18] Iran’s mine-laying activities and threats to mine the strait are also a key component of

this effort. Reuters, citing shippers in Asia and Europe, reported that shipping companies intend to resume navigation only after authorities fully confirm the safety of the waterway.[19] Reuters, citing Western maritime security services, added that mine-clearing operations could take 40 to 50 days.[20] Trump stated on June 14 that mine-removal operations will begin after the agreement is signed on June 19.[21] Iranian officials and media have not commented publicly on potential mine-clearing efforts.



Hezbollah has signaled that it will adhere to the Lebanon ceasefire outlined in the US-Iran agreement and suggested that the group views the agreement as a precursor for Israel's withdrawal from Lebanon.[22] Hezbollah issued a statement on June 15 in which it congratulated Iran for reaching an agreement with the United States that includes "a comprehensive ceasefire across all fronts, including Lebanon." [23] A Hezbollah official told Reuters on June 15 that the group has ceased offensive operations since the US-Iran deal was announced and that Hezbollah's compliance with the ceasefire is linked to Israel's adherence to it. [24] ISW-CTP has not observed any Hezbollah attacks on northern Israel since the United States and Iran announced the agreement. Hezbollah also implied in its statement that the US-Iran agreement sets conditions for an IDF withdrawal from southern Lebanon, stating that the agreement "is a prelude to completing the liberation" of Lebanon. [25] Hezbollah has repeatedly demanded a full IDF withdrawal from Lebanon as part of any comprehensive ceasefire agreement. [26] Iranian media similarly implied on June 15 that an IDF withdrawal from southern Lebanon is part of the US-Iran agreement. [27] The Hezbollah official speaking to Reuters added that Hezbollah rejects IDF "freedom of movement" in Lebanon, which further illustrates Hezbollah's maximalist demand for an IDF withdrawal. [28] A senior US official told an Israeli reporter on June 15 that "an Israeli withdrawal from southern Lebanon is not a condition for reaching an agreement with Iran," however. [29] Israel does not appear to be a party to this agreement, which complicates the clause that calls for a ceasefire in Lebanon. [30]

Israeli officials have stated that the IDF will continue to operate in Lebanon to degrade Hezbollah. Hezbollah and Iran could make their implementation of the US-Iran agreement contingent upon the cessation of Israeli operations against Hezbollah in order to push Israel to halt these operations. Israeli Defense Minister Israel Katz said on June 15 that Israel will maintain an indefinite IDF presence in security zones in Lebanon, Syria, and the Gaza Strip in order to maintain Israel's security. [31] Katz added that the IDF's establishment of security zones in southern Lebanon is "among the IDF's greatest achievements" in the war and emphasized that Israel "oppose[s] an IDF withdrawal from Lebanon, despite all the existing pressures and those that will still come." [32] A US official separately told an Israeli journalist that Israel has the right to respond to any Hezbollah attack. [33] Lebanese media reported that the IDF continued to strike targets in southern Lebanon as recently as the morning of June 15. [34] There are also conflicting reports on whether the IDF has

continued ground operations in southern Lebanon. Two IDF soldiers in southern Lebanon told an Israeli journalist on June 15 that all IDF activity has ceased since the announcement of the US-Iran agreement.[35] Lebanese sources continue to report IDF movements and advances, including in towns beyond the "Yellow Line," however.[36] Iran recently linked US-Iran negotiations to the Lebanon issue in order to pressure the United States to push Israel to halt operations against Hezbollah.[37] Iran could similarly seek to make its implementation of the US-Iran agreement contingent upon Israel agreeing to a "comprehensive ceasefire" in Lebanon.

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

Supporters of the US-Iran agreement within the Iranian regime continue to attempt to build a consensus around the US-Iran agreement amid criticism from the regime's anti-negotiations camp, led by the ultrahardline Paydari (Stability) Front. Iranian President Masoud Pezeshkian and Parliament Speaker Mohammad Bagher Ghalibaf continued to defend Iran's decision to sign the agreement and repeated their calls for Iranians to maintain unity and national cohesion.[38] Pezeshkian stated on June 15 that "nearly all" Iranian parliamentarians support the agreement and emphasized that the agreement was signed under the "guidance" of Supreme Leader Mojtaba Khamenei.[39] Pezeshkian's comment comes amid criticisms from some Paydari Front members toward Iran's negotiating team and the US-Iran agreement. A Paydari Front parliamentarian criticized the agreement's reportedly vague timeline for the release of Iranian assets, for example..[40]

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See topline section.

Other Axis of Resistance Activity

Nothing significant to report.

Endnotes

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Iran Update Special Report, June 16, 2026



Katherine Wells, Ben Rezaei, Carolyn Moorman, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Multiple sources published what appears to be the text of the US-Iran agreement. Neither the United States nor Iran has officially published the text of the agreement at this time. The leaked text of the agreement, if accurate, indicates that Iran has emerged from the conflict in a stronger strategic position, however.
2. The MoU reportedly grants Iran significant economic relief, which Iran would likely use to try to reconstitute its missile, drone, and nuclear programs, as well as the Axis of Resistance. The MoU states that Iran could receive further economic relief by fulfilling its commitments in the MoU and reaching a final agreement that addresses key nuclear issues. ISW-CTP has not observed any indications that Iranian decision-makers are willing to make concessions on the nuclear issues that would be included in a final agreement, however.
3. Iran will likely try to exploit the agreement's seemingly ambiguous language about the Strait of Hormuz to try to enforce its control over shipping through the strait. The reported text of the agreement does not explicitly bar Iran from "managing" the strait, and Iran could therefore continue to insist on vessels using its illegal traffic separation scheme in Iranian territorial waters and paying "fees" to the IRGC Navy.
4. The Iranian regime is interpreting the clause in the agreement about a ceasefire "on all fronts" as a requirement for Israel to cease operations against Hezbollah and withdraw from Lebanon. This interpretation is part of a broader Iranian effort to preserve Hezbollah by trying to secure Israel's capitulation in Lebanon.
5. The reported MoU terms indicate that Iran structured the agreement in a way to try to limit the United States' ability to impose renewed pressure on Iran during the 60-day negotiations period and thereby make it more challenging for the United States to extract concessions from Iran during the negotiations.
6. Iranian officials and media are largely framing the US-Iran MoU as an Iranian victory that codifies Iran's military achievements. The Iranian regime's English-language media outlet, Press TV, argued on June 16 that the MoU is not simply a ceasefire, but rather represents the "political codification of

a battlefield reality.”

Toplines

Multiple sources published what appears to be the text of the US-Iran agreement. Neither the United States nor Iran has officially published the text of the agreement at this time. The leaked text of the agreement, if accurate, indicates that Iran has emerged from the conflict in a stronger strategic position, however. Foreign policy analyst Josh Block and Saudi media published an identical version of the US-Iran memorandum of understanding (MoU) on June 16, detailing all 14 clauses of the agreement that the United States and Iran are set to sign in Switzerland on June 19.[1] The text declares that Iran and the United States will conduct further negotiations for 60 days upon signing the MoU, but notes that this negotiation period is “extendable by mutual consent.”[2] Western media outlets such as the *Wall Street Journal* and Axios corroborated several clauses of the agreement published by Block and Saudi media.

The MoU reportedly grants Iran significant economic relief, which Iran would likely use to try to reconstitute its missile, drone, and nuclear programs, as well as the Axis of Resistance. Block, Saudi media, and the *Wall Street Journal* reported that the United States will lift its blockade on Iranian ports and waive sanctions on Iranian oil exports and “related services” immediately upon signing the MoU.[3] Axios, citing a source familiar with the text, reported that the United States will “gradually” lift its blockade within 30 days of signing the MoU.[4] Iranian regime outlet Mehr News estimated on June 16 that Iran could generate up to \$10 billion USD from just 60 days of oil exports.[5] Iran would likely use immediate economic relief to try to reconstitute its military capabilities, the Axis of Resistance, and its nuclear program. Arab mediators told the *Wall Street Journal* on June 13 that IRGC Commander Major General Ahmad Vahidi, whom ISW-CTP assesses as dominating regime decision-making, has insisted that Iran’s frozen assets should not be “barred from military spending.”[6] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei similarly stated in May that Iran would use assets released under a potential agreement with the United States to advance its defense and military sectors, including Iran’s missile and drone programs.[7]

The MoU states that Iran could receive further economic relief by fulfilling its commitments in the MoU and reaching a final agreement that addresses key nuclear issues. ISW-CTP has not observed any indications that Iranian decision-makers are willing to make concessions on the nuclear issues that would be included in a final agreement, however. Block and Saudi media reported that the United States will release “frozen or restricted” funds and assets “in light of the progress of negotiations towards a final agreement.”[8] US Vice President JD Vance clarified to ABC News on June 15 that the release of frozen assets is contingent upon Iran taking “verified steps” to eliminate its highly enriched uranium (HEU) stockpile.[9] The United States, “together with its regional partners,” will also commit to forming a “rehabilitation and economic development” plan worth at least \$300 billion USD, according to the text published by Block, Saudi media, and several Western outlets.[10] An Iranian outlet affiliated with Supreme Leader Military Adviser Mohsen Rezaei similarly reported that the MoU requires the United States and its allies to present a reconstruction plan worth at least \$300 billion USD to Iran.[11] US President Donald Trump denied that the United States would give Iran \$300 million USD.[12] The economic development plan is contingent upon the United States and Iran reaching a final nuclear agreement that addresses Iran’s HEU stockpile and ability to enrich uranium on Iranian soil, but key Iranian decision-makers, such as Vahidi, have not signaled any willingness to concede on these issues. The current MoU reiterates Iran’s commitment not to produce a nuclear weapon. Iranian officials have historically insisted that Iran does not seek to produce a nuclear weapon, but the regime has nevertheless developed in recent years the latent capability to develop a nuclear weapon if it decides to

do so.

Iran will likely try to exploit the agreement’s seemingly ambiguous language about the Strait of Hormuz to try to enforce its control over shipping through the strait. The MoU stipulates that Iran “will immediately take steps to ensure that the movement of merchant ships [through the strait] is resumed within 30 days to the pre-war volume,” according to Block, Saudi media, and several Western outlets.[13] Iran is expected to remove “technical obstacles” and naval mines from the strait during the 30-day period.[14] The text published by Block and Saudi media does not explicitly bar Iran from “managing” the strait, and Iran could therefore continue to insist on vessels using its illegal traffic separation scheme in Iranian territorial waters and paying “fees” to the IRGC Navy.[15] The MoU text also states that the United States and Iran will “respect each other’s sovereignty and territorial integrity” and “refrain from interfering in each other’s internal affairs.”[16] The Iranian regime has repeatedly claimed that it and Oman control the Strait of Hormuz as territorial waters. Iran could also try to argue that its “management” of the strait is an Iranian internal affair. The MoU text published by Block and Saudi media also does not mention whether Iran can charge tolls, despite President Trump stating on June 14 that vessels can pass through the strait “toll-free.”[17] Some versions of the agreement published in Western media on June 16 do mention that Iran will not charge tolls for 60 days and that Iran will work with Oman to “define future administration and maritime services” in the strait, however.[18] IRGC-affiliated media stated on June 15 that Iran will pause charging “fees” for 60 days but intends to resume charging “fees” after that period.[19] Iranian officials have consistently claimed that Iran is charging “service fees” as opposed to tolls in the Strait of Hormuz, and therefore that vessels are able to transit through the strait “toll-free.”

The Iranian regime is interpreting the clause in the agreement about a ceasefire “on all fronts” as a requirement for Israel to cease operations against Hezbollah and withdraw from Lebanon. This interpretation is part of a broader Iranian effort to preserve Hezbollah by trying to secure Israel’s capitulation in Lebanon. Block and Saudi media reported that the MoU states that Iran and the United States, along with their allies, agree to “an immediate and permanent end to the war on all fronts, including Lebanon” and commit to “not launch any hostile action against each other.”[20] Iranian officials and media have argued that any Israeli attack against Hezbollah or Israeli military presence in Lebanon constitutes a violation of the MoU.[21] Israel does not appear to be a signatory to the MoU and continues to operate against Hezbollah in southern Lebanon, however. The Israel Defense Forces (IDF) continued to launch airstrikes against Hezbollah targets in response to Hezbollah attacks on Israeli forces in southern Israel.[22]

Reported Details of the US-Iran MoU and Stated US and Iranian Positions. ISW
As of 2:00 PM ET on June 16, 2024

	Text of the US-Iran agreement published by foreign policy analyst Jack Block on June 16, 2024	Details of the US-Iran agreement published by ISW media	Statements from US officials	Statements from Iranian officials and media
Strait of Hormuz	<ul style="list-style-type: none"> Iran “will immediately take steps to ensure that the movement of merchant ships through the Strait of Hormuz is resumed within 30 days to the pre-war volume.” 	<ul style="list-style-type: none"> Iran, citing a source familiar with the text, reported that Iran “will make arrangements for the safe passage of commercial vessels with no charge for 60 days” and that Iran will engage with Oman “to define future administration and maritime services.” 	<ul style="list-style-type: none"> US Vice President JD Vance stated on June 15 that the United States expects the Strait of Hormuz to be “open” in a “define way in the long term.” 	<ul style="list-style-type: none"> IR-affiliated media stated on June 15 that Iran will pause imposing “fees” on vessels for 60 days but intends to resume charging “fees” after this period.
Lebanon	<ul style="list-style-type: none"> The MoU declares “an immediate and permanent end to the war on all fronts, including Lebanon.” Iran and the United States, “together with their allies,” will “not launch any hostile action against each other.” 	<ul style="list-style-type: none"> A US official told AP News that the agreement does not require on Israeli withdrawal from Lebanon. 	<ul style="list-style-type: none"> The US Ambassador to Israel stated that Iran and Hezbollah “aren’t linked” in the deal and that Israel “doesn’t need [any] permission to defend itself.” 	<ul style="list-style-type: none"> Iranian officials, including Foreign Affairs Minister Abbas Araghchi, have stated that any attack against Hezbollah or Israeli military presence in Lebanon violates the MoU.
Nuclear Program	<ul style="list-style-type: none"> Iran and the United States have agreed that “the fate of enriched uranium and the fate of all other mutually agreed nuclear-related issues will be adequately addressed in a final agreement.” 	<ul style="list-style-type: none"> Iran, citing a source familiar with the text, reported that Iran and the United States agreed to “resolve the disposition of stockpiled enriched uranium” and “discuss the issue of future enrichment and other mutually agreed matters.” 	<ul style="list-style-type: none"> US President Donald Trump stated on June 15 that Iran has agreed to never have a nuclear weapon. 	<ul style="list-style-type: none"> Iranian officials have stated that Iran will discuss nuclear issues during the 60-day negotiations period but have not indicated any willingness to concede on key nuclear issues.

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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

See topline section.

Other Axis of Resistance Activity

Iraqi Prime Minister Ali al Zaydi and US Special Envoy for Iraq and Syria Tom Barrack released a joint statement on June 16 that outlined a shared vision for the “complete disarmament and disbandment of [Iraqi] armed groups.” Zaydi and Barrack released the statement after meeting in Baghdad on June 15.[27] The statement comes amid the Iraqi federal government’s efforts to restrict weapons to the state.[28] The United States has increasingly pressured the Iraqi federal government in recent months to decrease Iranian influence in Iraq, including through militia disarmament, due to militia attacks against US and foreign targets in Iraq and the region during the war.[29] Zaydi is expected to meet with US President Donald Trump in Washington, DC, in July.[30]

Popular Mobilization Commission (PMC) Chairman Faleh al Fayyadh replaced the Saraya al Salam-affiliated Popular Mobilization Forces (PMF) Samarra Operations Command commander with an Asaib Ahl al Haq member on June 16.[31] The PMF is an Iraqi state security service that includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[32] The Popular Mobilization Commission is officially responsible for ensuring that PMF brigades answer to the prime minister.[33] Shia Nationalist Movement leader Muqtada al Sadr announced the dissolution of Saraya al Salam on May 27 and the full integration of the militia’s members into the Iraqi state.[34] Samarra City holds religious significance for Iraqi Shia and Sadr-aligned forces, including Saraya al Salam, have maintained control and influence in the area for years.[35] Iraqi media reported on June 16 that Sadr directly ordered Saraya al Salam forces to accept the PMC’s decision.[36] Saraya al Salam announced on June 16 that its forces will remain in Samarra City until the “security file” has been legally transferred to the state, but confirmed the group’s separation from Sadr’s Shia Nationalist Movement and

full integration into the Iraqi state.[37] The replacement of a Saraya al Salam-affiliated commander with an Asaib Ahl al Haq member is particularly notable given the long-standing tensions between these two groups. Asaib Ahl al Haq head Qais al Khazali formed Asaib Ahl al Haq as a splinter group from Sadr's Mahdi Army, which preceded Saraya al Salam, in the years following the 2003 US invasion of Iraq.[38] Forces from Saraya al Salam and Asaib Ahl al Haq clash sporadically in southern Iraq.[39]

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CORRECTION: As of June 17, ISW-CTP has updated the IDF and Hezbollah Attacks in Lebanon map. A previous version of this map incorrectly depicted that Hezbollah had conducted attacks on northern Israel between 2:00 PM ET on June 15 and 2:00 PM ET on June 16. ISW-CTP did not record any Hezbollah attacks on northern Israel during this time period. We apologize for this error.

Iran Update Special Report, June 17, 2026



Ben Rezaei, Nidal Morrison, Parker Hempel, Benjamin Schmida, Carolyn Moorman, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET. Information Cutoff: 7:00 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 United States and Iran signed the memorandum of understanding (MoU) on June 17. Iran is claiming that the final MoU text satisfies some of its key war aims related to Lebanon and the Strait of Hormuz. The final MoU is basically unchanged from the version provided to Bloomberg on June 16, except for text changes in clauses one and five that Iran reportedly requested.
2. Top Iranian officials are using these changes to imply that they have satisfied their key war aims of controlling the Strait of Hormuz and preserving Hezbollah. This demonstrates the degree of ambiguity inherent in this MoU and suggests that the United States and Iran have divergent views of the agreed-upon text.
3. Iran will likely use renewed economic access under the MoU to reconstitute members of the Axis of Resistance, particularly Hezbollah, during the 60-day negotiation period. Iran has already told Hezbollah that Iran will increase its funding as soon as possible once the United States unfreezes Iranian assets.
4. The United States reportedly conditioned economic support for Iraqi Prime Minister Ali al Zaydi's government on its ability to meet several conditions, including disarming Iranian-backed Iraqi militias and dismantling their financial networks. The United States demanded the removal of Popular Mobilization Forces (PMF) leaders associated with Iranian-backed Iraqi militias before integrating the PMF into official Iraqi security institutions, according to political sources speaking to Iraqi media on June 17.

Toplines

The United States and Iran signed the memorandum of understanding (MoU) on June 17.[1] Iran is claiming that the final MoU text satisfies some of its key war aims related to Lebanon and the Strait of Hormuz.[2]US officials briefed US media, including the *New York Times*, CNN, Axios, and others, on the

contents of the MoU before Iran and the United States signed it.[3] The final MoU is basically unchanged from the version provided to Bloomberg on June 16, except for text changes in clauses one and five that Iran reportedly requested.[4] Islamic Revolutionary Guards Corps (IRGC)-affiliated Fars News reported on June 15 that Iran had earlier secured important changes to the draft MoU.[5] These changes included the addition of the phrase “guaranteeing sovereignty and respect for the territorial integrity of Lebanon” to the first clause, references to a joint Iranian-Omani maritime services administration in the Strait of Hormuz to the fifth clause, and an addition that the MoU would bar fee collection in the strait for 60 days, also in the fifth clause.[6] All three of these changes are reflected in the version briefed to US media but not in the earlier version leaked to Bloomberg (changes highlighted below in bold).[7] IRGC-affiliated Tasnim News Agency noted on June 17—before the signing and the briefing to US media—that Bloomberg’s reported text was inaccurate and had “numerous flaws” related to Lebanon and the Strait of Hormuz.[8]

Clause 1: “The United States of America and the Islamic Republic of Iran and their allies in the current war by signing this MoU declare the immediate and permanent termination of military operations on all fronts, including in Lebanon, and undertake from now on not to initiate any war or any military operation against each other, and to refrain [from] the threat or use of force against each other and **ensuring the territorial integrity and sovereignty of Lebanon**. The final deal will confirm the permanent termination of the war on all fronts, including in Lebanon, and other provisions of this paragraph.”[9]

Clause 5: “Upon the signing of this MoU, the Islamic Republic of Iran will make arrangements using its best efforts for **the safe passage of commercial vessels with no charge for 60 days only** from the Persian Gulf to the Sea of Oman, and vice versa. The traffic of commercial vessels will immediately start, and considering the need for removing the technical and military obstacles and demining by the Islamic Republic of Iran, will be instated within 30 days. **The Islamic Republic of Iran will conduct dialogue with the Sultanate of Oman to define the future administration and maritime services** in the Strait of Hormuz, in discussion with other Persian Gulf littoral states in line with the applicable international law and the sovereign rights of coastal states of the Strait of Hormuz.”[10]

Top Iranian officials are using these changes to imply that they have satisfied their key war aims of controlling the Strait of Hormuz and preserving Hezbollah. Iranian First Vice President Mohammad Reza Aref said that Iran would retain control over the Strait of Hormuz and that vessels transiting the waterway should pay service fees for safe navigation of the strait.[11] Iran continues to be the only threat against commercial shipping in the strait. Aref said that the Strait of Hormuz “belongs to Iran” and that its management will remain Iran’s responsibility.[12] Clause 5 indicates that Iran would need to negotiate with the Gulf Arab states to ensure its management of the strait, however, and it remains unlikely that the Gulf Arab states would acquiesce to Iranian demands without Iranian coercion.[13] The fact that Iran can negotiate the status of an international waterway is nonetheless an erosion of long-established international law and norms enshrined in the UN Convention on the Law of the Sea (UNCLOS).[14]

Iran also appears to believe that the MoU requires Israel to withdraw from Lebanon, which would help preserve Hezbollah. A Hezbollah source told Emirati media on June 16 that Iran told Hezbollah that the withdrawal of Israeli troops from Lebanon is included in the US-Iran MoU and is expected to occur over a phased 60-day period.[15] The source added that the withdrawal of Israeli troops from Lebanon now depends on Israel, because Israel is not a party to the MoU and remains in

Lebanon.[16] A Lebanese political source told Emirati media on June 16 that Lebanon has received “no official guarantees” over an Israeli withdrawal and has not yet discussed the issue with US officials, which is at odds with Iranian claims that the MoU clearly requires Israel to withdraw from Lebanon.[17] **This demonstrates the degree of ambiguity inherent in this MoU and suggests that the United States and Iran have divergent views of the agreed-upon text.**

Iran is already taking positive action regarding Lebanon and the Strait of Hormuz to enforce its interpretation of the MoU’s terms. Iran threatened retaliation against Israel if Israeli operations in Lebanon continue. The Khatam ol Anbia Central Headquarters characterized continued Israeli operations in southern Lebanon as “ceasefire violations” on June 16 and warned that Israel should expect a “harsh [Iranian] response” if the IDF does not cease its operations in southern Lebanon.[18] These threats are designed to force the United States to pressure Israel to end its operations in southern Lebanon to preserve the agreement. Iran is also continuing to maintain its “management” of the Strait of Hormuz by demanding vessels adhere to IRGC requirements and threatening those that do not. Iranian media reported that vessels are still waiting for IRGC approval to move through the strait.[19] An unspecified US official told NBC on June 16 that the US military has intercepted drones that the IRGC has fired toward commercial ships in the Strait of Hormuz every night since the MoU’s announcement on June 14.[20]

The Iranian factions that secured and approved the deal are trying to sell the agreement, which appears somewhat politically sensitive in Tehran. ISW-CTP continues to assess that IRGC Commander Major General Ahmad Vahidi and his inner circle are predominant in Iranian policymaking, but others—including pro-negotiations figures like Parliament Speaker Mohammad Bagher Ghalibaf and Foreign Affairs Minister Abbas Araghchi—were also deeply involved in negotiations. Some Iranian parliamentarians and regime-linked media have criticized the agreement, however. Parliamentary National Security and Foreign Policy Commission spokesperson Ebrahim Rezaei described the MoU as “imbalanced” and said that it did not observe all of the regime’s red lines[21] Rezaei also rejected accusations that critics of the MoU[22] Hardline media outlet Kayhan separately wrote on June 17 that the [23] Kayhan criticized Iranian officials for withholding the text from the Iranian public and said Parliament must prevent the “secret implementation” of a document that Parliament does not know[24] The figures opposing the agreement are not particularly influential in Tehran, but they do represent a regime faction that Iranian leaders may find it necessary to placate, especially if the promised economic dividends fail to come to fruition.

Iranian media is also using potential, early economic benefits that Iran would receive under the MoU to argue that Iran secured tangible and irreversible benefits without abandoning its core demands. Iranian media have highlighted meetings and discussions with Russian and Chinese counterparts and heavily publicized Iranian oil tankers crossing or approaching the blockade line.[25] Islamic Development Organization (IDO)-affiliated outlet Mehr News Agency reported on June 16 that the MoU gives Iran “cash” benefits, including access to part of its frozen assets, a suspension of oil sanctions, and free access to oil revenue.[26] Mehr estimated that Iran could earn up to \$10 billion USD from 60 days of oil sales and that Iran’s total revenue during this period could exceed \$30 billion USD.[27] This messaging suggests that the regime may be using ambiguity over Lebanon and the Strait, alongside early economic benefits, to frame the MoU as a victory and manage domestic criticism.

Iran will likely use renewed economic access under the MoU to reconstitute members of the Axis of Resistance, particularly Hezbollah, during the 60-day negotiation period. Iran has already told Hezbollah that Iran will increase its funding as soon as possible once the United States unfreezes Iranian assets.[28] Israel badly degraded Hezbollah during the October 7 War.[29] The collapse of the Assad regime in Syria made Hezbollah’s resupply more difficult, and Iran’s competing priorities—including rebuilding its own assets without any financial relief after June 2025—made funding the reconstitution of Hezbollah and other Axis members relatively more challenging.[30] Iran did provide

Hezbollah with roughly \$1 billion USD between the 2024 war and the 2026 war, but relaxing sanctions and providing Iran with greater access to revenue will provide Iran with more money it can choose to provide to Hezbollah.[31] Clause 11 of the MoU, as reported by Bloomberg, states that the United States may unfreeze Iranian assets in response to “progress of negotiations towards a final agreement.”[32] Lebanese and regional sources told Reuters on June 17 that Iran has promised Hezbollah that it will increase the group’s funding “as soon as possible,” once the United States unfreezes Iranian assets as a part of the MoU.[33] The degree to which Axis of Resistance factions remain contained or weakened after the last nearly three years of war is in large part contingent on how much funding Iran can provide to them.

The United States reportedly conditioned economic support for Iraqi Prime Minister Ali al Zaydi’s government on its ability to meet several conditions, including disarming Iranian-backed Iraqi militias and dismantling their financial networks.[34] Iraqi government sources told regional media on June 17 that the United States recently delivered two shipments of an unspecified amount of US dollars to the Central Bank of Iraq, which coincided with US Special Envoy Tom Barrack’s visit to Baghdad.[35] The sources described the shipments as “economic cover” for Zaydi’s government that is “contingent” on Iraq meeting US conditions.[36] These cash shipments were the first the United States has sent to Iraq since the US Treasury Department halted shipments of US dollars in April 2026 due to concerns about militia attacks during the war.[37] The Central Bank of Iraq has managed an account at the New York Federal Reserve on behalf of the Iraqi Finance Ministry since 2003 that holds the Iraqi federal government’s revenue from oil exports in US dollars.[38] Oil revenue accounts for about 90 percent of the Iraqi state’s budget.[39] Sources also told Iraqi media on June 17 that US Special Envoy Tom Barrack also threatened “unlimited options,” which could refer to US sanctions or future cessations of US dollar transfers to Iraq, if Zaydi fails to meet US conditions.[40]

The United States demanded the removal of Popular Mobilization Forces (PMF) leaders associated with Iranian-backed Iraqi militias before integrating the PMF into official Iraqi security institutions, according to political sources speaking to Iraqi media on June 17.[41] The PMF is an Iraqi state security service that currently operates separately from the Iraqi security establishment and includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[42] Many Iranian-backed Iraqi militia commanders simultaneously command official PMF Brigades.[43] The Iraqi federal government has recently taken initial steps to disarm the militias, including receiving files and data on Iranian-backed Iraqi militia Kataib al Imam Ali’s assets and forming a joint disarmament committee with representation from the PMF, Kataib al Imam Ali, and Asaib Ahl al Haq.[44] Both Kataib al Imam Ali and Asaib al Haq have indicated their interest in disarmament, in order to possibly lessen US opposition to their participation in the next Iraqi government. It is also possible that these militias seek to receive some of the 35,000 jobs that jobs in Iraqi security institutions that Zaydi has reportedly proposed to be allocated to militia members who disarm.[45] ISW-CTP continues to assess that 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.[46]

Political sources also told Iraqi media on June 17 that Barrack demanded that the Iraqi government dismantle Iraqi militia-associated financial networks.[47] Iraqi media added that the United States demanded the closure of at least 10 banks accused of dollar smuggling and money laundering.[48] The US Treasury Department sanctioned several Iraqi bank executives in 2025 for exploiting their position to launder money and generate revenue for Iranian-backed Iraqi militias.[49] The US and Iraq have also banned several Iraqi banks from engaging in US dollar transactions since 2022 for laundering money for the IRGC Quds Force and Iranian-backed Iraqi militias.[50]

US-Iran Negotiations

See the topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See the topline section.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

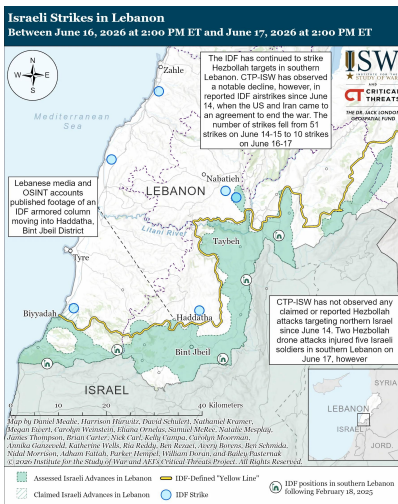
See the topline section.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) and Hezbollah have continued to engage one another in southern Lebanon, in spite of the US-Iran MoU. The IDF continued to strike Hezbollah targets in southern Lebanon on June 17.[51] ISW-CTP has observed a notable decline, however, in reported IDF airstrikes since June 14, when the US and Iran came to an agreement to end the war.[52] The number of strikes fell from 51 strikes on June 14-15 to 10 strikes on June 16-17.[53] Hezbollah has not claimed an attack against Israeli forces since June 15, but the IDF reported on June 17 that Hezbollah has continued to conduct rocket and drone attacks targeting Israeli forces in southern Lebanon.[54] The IDF reported on June 17 that two Hezbollah drone attacks injured five Israeli soldiers in southern Lebanon, for example.[55] ISW-CTP has not observed any claimed or reported Hezbollah attacks targeting northern Israel since June 14, however. Israeli media reported on June 16 that the IDF will continue its operations "as normal" south of the IDF's Yellow Line, and Israeli officials have repeatedly emphasized that Israeli forces will remain in southern Lebanon.[56] Israeli forces have also continued to advance beyond the Yellow Line in order to combat Hezbollah. Lebanese media and OSINT accounts published footage of an IDF armored column advancing into Haddatha, Bint Jbeil District, on June 17.[57] Hezbollah previously defended against an IDF assault on Haddatha on May 19 and 20.[58]

Hezbollah, Iranian officials, and Iranian media continued to claim on June 17 that the US-Iran agreement requires Israel to cease operations against Hezbollah and ultimately withdraw from southern Lebanon (see topline text above).[59]



Other Axis of Resistance Activity

Iraqi Prime Minister Ali al Zaydi reinstated Saraya al Salam-affiliated Popular Mobilization Forces (PMF) commander Ali al Aqili as Samarra Operations Command commander, according to an unnamed Saraya al Salam source speaking to Iraqi media on June 17.[60] Aqili's reinstatement comes after Popular Mobilization Commission (PMC) Chairman Faleh al Fayyadh replaced Aqili with an Asaib Ahl al Haq member on June 16.[61] Saraya al Salam is the armed wing associated with nationalist Iraqi Shia cleric Moqtada al Sadr. The PMC chairman is roughly equivalent to a service chief in the US military and controls the PMF, which is an Iraqi security service that contains many Iranian-backed Iraqi militias.[62] Iraqi media reported on June 16 that Sadr's Shia Nationalist Movement ordered Saraya al Salam to accept Fayyadh's decision to remove Aqili.[63] Sadr previously announced the dissolution of Saraya al Salam and the full integration of the militia's members into the Iraqi state on May 27.[64] The replacement of a Saraya al Salam-affiliated commander with an Asaib Ahl al Haq member was notable, given the long-standing tensions between these two groups. Asaib Ahl al Haq head Qais al Khazali formed Asaib Ahl al Haq as a splinter group from Sadr's Mahdi Army, which preceded Saraya al Salam, in the years following the 2003 US invasion of Iraq.[65] Forces from Saraya al Salam and Asaib Ahl al Haq have clashed sporadically in southern Iraq in recent years[BS2] [CM3] .[66]

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Iran Update Special Report, June 18, 2026



Ria Reddy, Parker Hempel, Ben Rezaei, Carolyn Moorman, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Islamic Revolutionary Guards Corps-affiliated media has made Iranian implementation of the US-Iran agreement, particularly provisions concerning the Strait of Hormuz, contingent on an end to Israeli operations against Hezbollah in Lebanon. Iran is likely connecting these two clauses to compel the United States to pressure Israel to cease operations in Lebanon.
2. The Israel Defense Forces has continued operations against Hezbollah in southern Lebanon, despite Iranian insistence that Israel must halt its campaign in Lebanon as part of the MoU. Hezbollah seriously affects northern Israeli security, and its attacks have displaced Israeli citizens there. Israel is not a signatory to the MoU, even though the signatories added language that implied that Israel and Hezbollah were signatories.
3. Iran, under the current MoU, retains the ability to use the Strait of Hormuz as a tool to secure concessions and advance its strategic objectives. Recent Iranian threats to keep the strait closed unless Israel ends operations in Lebanon further demonstrate the regime's willingness to use the waterway as a strategic source of leverage.
4. Iranian officials continue to signal that the regime will charge "fees" in the long-term for vessels that want to transit the strait, which is part of the broader Iranian effort to maintain long-term control over the strait. The MoU allows for a resumption of fee collection after 60 days.

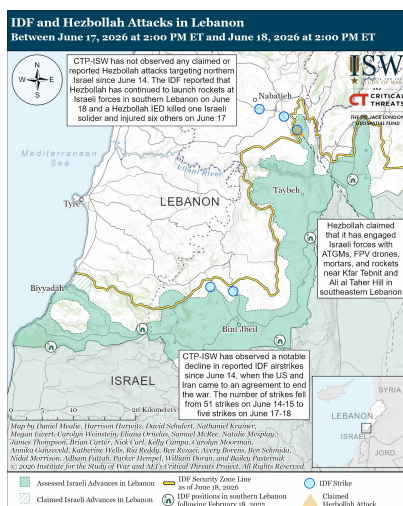
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Islamic Revolutionary Guards Corps (IRGC)-affiliated media has made Iranian implementation of the US-Iran agreement, particularly provisions concerning the Strait of Hormuz, contingent on an end to Israeli operations against Hezbollah in Lebanon. Iran is likely connecting these two clauses to compel the United States to pressure Israel to cease operations in Lebanon. Iranian and Hezbollah-affiliated actors have suggested that the memorandum of understanding (MoU) requires both a cessation of Israeli military operations in Lebanon and a complete Israeli withdrawal from

Lebanese territory.[1] Iran reportedly pushed to add language guaranteeing the “sovereignty and territorial integrity of Lebanon” to the agreement’s opening clause, likely to strengthen its longstanding maximalist objective of securing an Israeli withdrawal from Lebanon.[2] IRGC-affiliated Tasnim News Agency explicitly linked implementation of the agreement to developments in Lebanon, arguing that Iran should keep the Strait of Hormuz closed as long as Israel continues operations there.[3] Tasnim further warned that Iran could suspend future negotiations, reimpose restrictions in the strait, halt the reopening process, or respond militarily to Israeli actions if the MoU is not fully implemented.[4] These articles follow claims by senior Iranian officials and bodies, including the Khatam ol Anbiya Central Headquarters and the IRGC, that Israeli operations in Lebanon violate the MoU.[5]

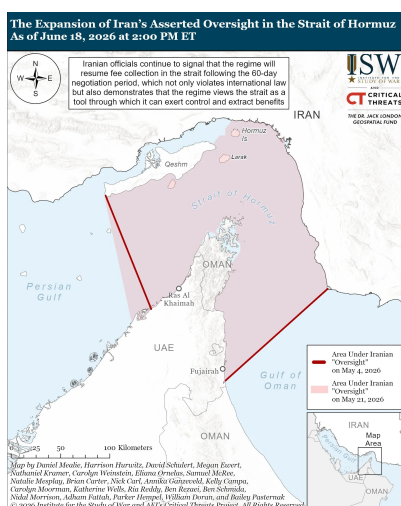
Hezbollah has twice initiated military operations against Israel since 2023 and entered wars without provocation. Hezbollah began attacking Israel on October 8, 2023, to support Hamas after it attacked Israel in the October 7 attack. Hezbollah again attacked Israel on March 1, 2026, to support Iran after US-Israeli operations began against Iran. Hezbollah seriously affects northern Israeli security, and its attacks have displaced Israeli citizens there. Israel is not a signatory to the MoU, even though the signatories added language that implied that Israel and Hezbollah were signatories. The MoU says that “the United States of America and the Islamic Republic of Iran and their allies in the current war are signing this MoU.”[6] Iran’s threats to collapse the agreement unless Israel ceases operations and withdraws from Lebanon likely reflect a deliberate effort to compel the United States to pressure Israel to end operations. Iran has surely observed reports in Western media that President Donald Trump prioritizes preserving the deal and has pressured Israeli Prime Minister Benjamin Netanyahu to limit military operations in Lebanon.[7]

The Israel Defense Forces (IDF) has continued operations against Hezbollah in southern Lebanon, despite Iranian insistence that Israel must halt its campaign in Lebanon as part of the MoU. The IDF stated on June 18 that it will remain deployed within the 10-kilometer-deep IDF “security zone” in southern Lebanon to remove Hezbollah threats to Israeli forces in southern Lebanon and Israeli residents in northern Israel.[8] Two Israeli officials told Reuters on June 18 that Israel recently held talks with the United States to discuss US approval for continued IDF presence in southern Lebanon.[9] Israeli media reported on June 18 that Israeli Prime Minister Benjamin Netanyahu told US President Donald Trump during a phone call that Israel will not leave southern Lebanon “as long as Israel’s security needs require it.”[10] Trump stated in a social media post on June 18 that the United States expects a complete ceasefire on all fronts, including in Lebanon between Hezbollah and Israel.[11] Hezbollah, Iranian officials, and Iranian media have continued to claim that the US-Iran agreement requires Israel to cease operations against Hezbollah and ultimately withdraw from southern Lebanon.[12] Both sides have continued to engage one another in southern Lebanon, including beyond the Yellow Line.[13]



Iran, under the current MoU, retains the ability to use the Strait of Hormuz as a tool to secure concessions and advance its strategic objectives. Iranian officials have repeatedly identified control over the strait as a core strategic objective and a key component of Iran’s long-term deterrence posture. Recognized control over the strait grants Iran substantial leverage over global trade, which it can use to extract political and economic concessions at its discretion. The US-Iran MoU requires Iran to “make arrangements using its best efforts for the safe passage of commercial vessels with no charge for 60 days only,” but notes that Iran will negotiate a joint Iranian-Omani management scheme with Oman and the other Gulf Arab states.[14] Iranian officials have continued to emphasize that an “open” strait is one subject to joint Iranian-Omani management and will attempt to achieve joint Iranian-Omani management, possibly by coercing the Gulf Arab states.[15] Recent Iranian threats to keep the strait closed unless Israel ends operations in Lebanon further demonstrate the regime’s willingness to use the waterway as a strategic source of leverage (see above).

Iranian officials continue to signal that the regime will charge “fees” in the long-term for vessels that want to transit the strait, which is part of the broader Iranian effort to maintain long-term control over the strait. The MoU allows for a resumption of fee collection after 60 days. Iranian parliamentarian Saeed Ajorlou stated on June 18 that the agreement only prohibits Iran from charging fees during the initial 60-day period, according to clause 5, and implied that the regime may resume “fee” collection afterward.[16] IRGC-affiliated similarly stated on June 15 that Iran would suspend fees for 60 days but intends to reinstate them once that period ends.[17] Iranian officials have consistently characterized these charges as “service fees” rather than transit tolls, arguing that vessels therefore continue to have “toll-free” passage. The United Nations Convention on the Law of the Sea (UNCLOS) does not permit states bordering international straits to restrict transit passage or impose charges for the right to transit, however.[18] The Strait of Hormuz is an international strait, not territorial waters, and Article 26 of UNCLOS—which permits fees in territorial waters—therefore does not apply. The regime’s explicit intention to charge “fees” over the long term not only violates international law but also demonstrates that the regime views the strait as a tool through which it can exert control and extract benefits. Iran’s efforts to charge fees come at a time when Iran faces severe economic challenges and needs resources to rebuild its military and defense sectors following the war.



Iranian Supreme Leader Mojtaba Khamenei appears to be trying to avoid responsibility for the US-Iran MoU. Mojtaba released a written statement on June 18 regarding the US-Iran MoU.[19] Mojtaba stated that he authorized the MoU but emphasized that he had “a different opinion in principle.”[20] He added that Iranian President Masoud Pezeshkian and the Supreme National Security Council (SNSC), of which Pezeshkian is chairman, are responsible for protecting Iran’s interests and preserving the Axis of Resistance. Placing responsibility with the president is almost certainly an effort to

evade responsibility for any possible failures that may result from the MoU or the negotiation process.[21] The SNSC is Iran’s highest national security and foreign policy decision-making body.[22] Mojtaba added that Pezeshkian told him that Iran will not submit if the United States makes “excessive demands.”[23] Mojtaba also highlighted that future in-person negotiations will not mean that Iran accepts the “enemy’s” view.[24] Mojtaba’s statement comes after CTP-ISW previously assessed that Iranian regime factions have competed over the scope and aims of negotiations.[25] Mojtaba’s emphasis that Pezeshkian and the SNSC hold responsibility for the MoU appears to be a reaction to domestic pushback against the deal and part of a broader regime effort to manage internal concerns about the MoU’s implementation.

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

See topline section.

Iran’s Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See topline section.

Other Axis of Resistance Activity

Popular Mobilization Commission (PMC) Chairman Faleh al Fayyadh appointed Saraya al Salam-affiliated Popular Mobilization Forces (PMF) Commander Ali al Aqili as an advisor to the PMF General Directorate of Operations on June 18 to oversee the “disengagement and reorganization” of Saraya al Salam-controlled PMF brigades.[26] Saraya al Salam is the armed wing affiliated with Iraqi Shia nationalist cleric Muqtada al Sadr.[27] Sadr announced the dissolution of Saraya al Salam and the full integration of the militia’s members into the Iraqi state on May 27.[28] The PMC Chairman is roughly equivalent to a service chief in the US military and controls the PMF, which is an Iraqi security service that includes many Iranian-backed Iraqi militias. Saraya al Salam controls the 313th, 314th, and 315th PMF brigades.[29] Zaydi told Iraqi media on June 18 that Aqili’s latest appointment would help preserve security and prevent escalating tensions in Samarra city.[30] The al Askari Shrine in

Samarra city holds religious significance for Iraqi Shia and Sadr-aligned forces, including Saraya al Salam. These militias have maintained control and influence in the area for years.[31] Saraya al Salam announced on June 16 that its forces will remain in Samarra city until the “security file” has been legally transferred to the state.[32]

Aqili’s appointment comes after Iraqi Prime Minister Ali al Zaydi reinstated Aqili as commander of the PMF Samarra Operations Command on June 17 after Fayyadh replaced Aqili on June 16 with an Asaib Ahl al Haq member.[33] Fayyadh’s initial decision to replace Aqili, a Saraya al Salam-affiliated commander, with an Asaib Ahl al Haq member was notable given the long-standing tensions between these two groups. Asaib Ahl al Haq head Qais al Khazali formed Asaib Ahl al Haq as a splinter group from Sadr’s Mahdi Army, which preceded Saraya al Salam, in the years following the 2003 US invasion of Iraq.[34] Forces from Saraya al Salam and Asaib Ahl al Haq have clashed sporadically in southern Iraq in recent years.[35] It is unclear if the Asaib Ahl al Haq member Fayyadh, who had initially been appointed to replace Aqili as commander of the Samarra Operations Command, will be reinstated, given Aqili’s new position.

The logistics of the “disengagement and reorganization” process for Saraya al Salam-controlled PMF brigades, which Aqili is to oversee, remain unclear. The Iraqi government has recently compared the process of reorganizing Saraya al Salam brigades to the ongoing effort to disarm Iranian-backed Iraqi militias.[36] It is notable that Aqili, who is affiliated with Saraya al Salam, will oversee the “disengagement and reorganization process” of PMF brigades with which he is affiliated.[37] Iranian-backed Iraqi militias Kataib al Imam Ali and Asaib Ahl al Haq, who have both recently indicated their interest in disarmament, are similarly involved in the Iraqi federal government’s disarmament process as members of a joint disarmament committee with the government.[38] Iranian-backed Iraqi militias overseeing the disarmament of PMF brigades they control could pose challenges for the Iraqi government’s ability to address the militias’ networks and allegiance to Iran. CTP-ISW continues to assess that any Iraqi federal government effort to disarm the militias that does not address these elements will likely further embed Iranian influence within the Iraqi state.[39] The Iraqi federal government’s steps towards restricting arms to the state come amid increased US pressure on the Iraqi federal government to decrease Iranian influence in Iraq. The United States has reportedly conditioned economic support for Zaydi’s government on its ability to meet several conditions, including disarming the militias and dismantling their financial networks.[40]

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Iran Update Special Report, June 19, 2026



Ben Rezaei, Carolyn Moorman, Kelly Campa, Ria Reddy, Bailey Pasternak, Annika Ganzeveld

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

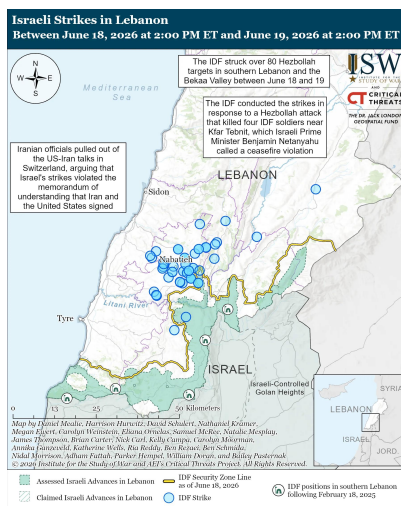
The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on the war with Iran. The updates cover events from the past 24-hour period.

Key Takeaways

1. Iran is attempting to condition US-Iran nuclear negotiations on the United States compelling Israel to halt operations against Hezbollah in Lebanon. Tying the US-Iran nuclear negotiations to the Lebanon issue not only helps Iran advance its strategic objective of preserving Hezbollah but also enables the regime to delay nuclear negotiations while reaping the economic benefits of the US-Iran memorandum of understanding (MoU).
2. Iran likely seeks to postpone nuclear negotiations in order to avoid having to make concessions on its nuclear program while benefiting from the economic relief that is included in the MoU. Iranian officials have not indicated any willingness to concede on key nuclear issues, such as Iran's highly enriched uranium stockpile and ability to enrich uranium on Iranian territory.
3. Israel and Hezbollah agreed to a new ceasefire on June 19. This ceasefire probably does not meet Iran's demand for a "complete ceasefire" in Lebanon because Iranian officials and media have repeatedly argued that a "complete ceasefire" in Lebanon requires the withdrawal of Israeli forces from Lebanese territory.
4. Iran is reopening the Strait of Hormuz in a way that retains Iranian control over the strait rather than restoring the pre-war status quo. Some elements of the Iranian regime have argued that Iran should close the Strait of Hormuz to extract further concessions from the US, such as securing an end to Israeli operations in Lebanon and an Israeli withdrawal.
5. The IRGC has formed multiple Iraqi militia cells that directly report to the IRGC, instead of pre-existing Iranian-backed Iraqi militias, in order to conduct attacks on Gulf countries hosting US forces, according to eight Iraqi sources speaking to Reuters on June 19. Iran reportedly formed these new militia cells to deflect responsibility for attacks from established militias amid increased US pressure on the Iraqi federal government to disarm Iraqi militias. It is also possible that Iran formed these new militia cells as part of an initial effort to build a new, loyal cadre of ideological militias over which Iran has strong control and would supplement the political activity of existing Iranian-backed Iraqi actors.

Toplines

Iran is attempting to condition US-Iran nuclear negotiations on the United States compelling Israel to halt operations against Hezbollah in Lebanon. Tying the US-Iran nuclear negotiations to the Lebanon issue not only helps Iran advance its strategic objective of preserving Hezbollah but also enables the regime to delay nuclear negotiations while reaping the economic benefits of the US-Iran memorandum of understanding (MoU). US and Iranian officials had planned to hold technical nuclear talks in Switzerland on June 19 in accordance with the US-Iran MoU. Iranian officials pulled out of the talks, citing Israel's recent strikes in Lebanon, which they claimed violated the MoU that the United States and Iran signed on June 17.[1] The Israel Defense Forces (IDF) struck over 80 Hezbollah targets in Lebanon between June 18 and 19 in response to a Hezbollah attack that killed four IDF soldiers near Kfar Tebnit in southern Lebanon.[2] The first clause of the US-Iran MoU calls for a ceasefire on all fronts, including Lebanon.[3] The Iranian regime has interpreted this clause as both requiring Israel to cease operations against Hezbollah and withdraw its forces from Lebanese territory. A later clause stipulates that negotiations on a final deal can only begin after the earlier clauses are implemented. Iran's insistence on a complete ceasefire in Lebanon is part of its effort to force an Israeli capitulation in Lebanon and thereby preserve Hezbollah, which Iran views as a key pillar of its deterrence strategy.



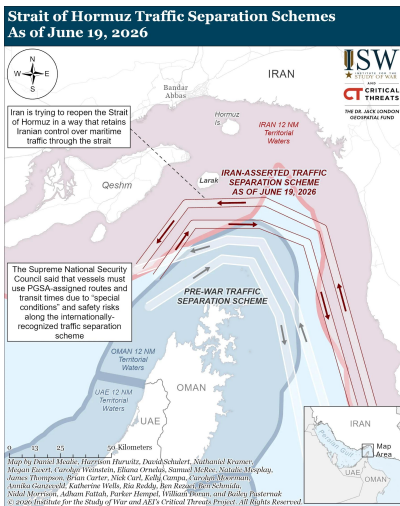
Iran is attempting to compel the United States to pressure Israel to end operations against Hezbollah, given that Israel is not a party to the MoU. Iranian Deputy Foreign Affairs Minister Saeed Khatib Zadeh told Al Jazeera on June 19 that the United States must ensure that Israel “abides” by the MoU and added that Iran is prepared to implement the MoU “step by step” if the United States implements its commitments in the agreement.[4] Khatib Zadeh’s statement indicates that Iran won’t proceed to the next step of the agreement, which stipulates that Iran and the United States will negotiate nuclear issues over a 60-day period, until the United States pushes Israel to cease its operations in Lebanon. Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei separately condemned Israeli operations in Lebanon and said that the United States bears direct responsibility for the situation.[5] Iranian Foreign Affairs Minister Abbas Araghchi similarly told Pakistani Foreign Minister Ishaq Dar on June 19 that the United States has a “commitment and responsibility” to end the war on all fronts, including Lebanon, and warned that the United States would be responsible for any violation of the MoU.[6]

Iran likely seeks to postpone nuclear negotiations in order to avoid having to make concessions on its nuclear program while benefiting from the economic relief that is included in the MoU. Iranian officials have not indicated any willingness to concede on key nuclear issues, such as Iran’s highly enriched uranium stockpile and ability to enrich uranium on Iranian territory. Iranian

officials likely seek to postpone discussions about these issues while simultaneously benefiting from the United States lifting its blockade on Iranian ports and issuing sanctions waivers for Iranian oil exports. A senior US official told Axios on June 17 that the negotiations process could stop in the next two to three weeks if Iran is not “serious about nuclear concessions.”[7]

Israel and Hezbollah agreed to a new ceasefire on June 19.[8] This ceasefire probably does not meet Iran’s demand for a “complete ceasefire” in Lebanon because Iranian officials and media have repeatedly argued that a “complete ceasefire” in Lebanon requires the withdrawal of Israeli forces from Lebanese territory. The United States “relayed” to Iran on June 19 that Israel will not “further escalate” its attacks against Hezbollah in Lebanon.[9] The Israeli ambassador to the United States confirmed on June 19 that Israel will abide by the ceasefire and end “offensive operations.”[10] A senior Israeli official indicated that the IDF would respond to future Hezbollah attacks, however.[11] The ambassador and several other Israeli officials also confirmed that Israeli forces will remain positioned in southern Lebanon and continue to operate there.[12] Hezbollah sources confirmed the ceasefire agreement.[13] Iran may use its interpretation of the MoU, which does not explicitly call for an Israeli withdrawal from Lebanon, to insist that the withdrawal of Israeli forces from Lebanon is a precondition for US-Iran nuclear talks. Iranian officials and media have continued to insist that an Israeli withdrawal from Lebanon is part of the MoU.[14] Iran repeatedly used the issue of Israeli operations against Hezbollah in Lebanon to try to delay negotiations over its nuclear program and the Strait of Hormuz prior to the signing of the MoU.[15]

Iran is reopening the Strait of Hormuz in a way that retains Iranian control over the strait rather than restoring the pre-war status quo. The Supreme National Security Council (SNSC) stated on June 18 that commercial vessels seeking to transit through the strait must submit requests to the Persian Gulf Strait Authority (PGSA), transit only along assigned routes and times, and comply with Iranian safety requirements.[16] The PGSA said that Iran will waive tariffs for “security, safety, and environmental services” and “related Iranian insurance” during the 60-day negotiations period.[17] IRGC-affiliated media previously reported that Iran intends to resume charging vessels fees after the 60-day period, but ISW-CTP has not previously observed reports of the regime requiring vessels to obtain “Iranian insurance.” The PGSA separately published a new map of Iran’s traffic separation scheme.[18] Iran’s new traffic separation scheme is different from the one it imposed in April 2026 but still passes through Iranian territorial waters. United Kingdom Maritime Trade Operations and the US Navy-led Joint Maritime Information Center warned vessels to avoid the international traffic separation scheme due to the presence of naval mines, but stated that the southern transit route along Omani territorial waters is clear of mines and is the recommended route.[19] British maritime security firm Ambrey and the *Wall Street Journal* separately reported that Iranian forces turned back some vessels and told them to apply for exit permits.[20] These developments indicate that Iran has allowed renewed transit through the strait but preserved a system that enables the regime to regulate and restrict access, which gives Iran significant leverage over global commerce.



Some elements of the Iranian regime have argued that Iran should close the Strait of Hormuz to extract further concessions from the US, such as securing an end to Israeli operations in Lebanon and an Israeli withdrawal. Iran retains the ability to use the Strait of Hormuz as a tool to secure concessions and advance its strategic objectives under the current MoU. Islamic Revolutionary Guards Corps (IRGC)-affiliated Tasnim News Agency argued on June 19 that the Strait of Hormuz must remain closed and future negotiations must be canceled until Israel stops operations in Lebanon and withdraws from Lebanese territory.[21] IRGC-affiliated Fars News similarly argued on June 19 that Iran should cancel negotiations with the United States as a first step and then close the Strait of Hormuz as a second step to force the United States to “contain” Israel.[22] The Iranian regime’s English-language media outlet, Press TV, described Iranian control over the Strait of Hormuz as Iran’s “permanent strategic leverage” and argued that Iran can use nuclear negotiations to secure Israel’s withdrawal from Lebanon, the release of Iranian frozen assets, and other US commitments.[23]

The IRGC has formed multiple Iraqi militia cells that directly report to the IRGC, instead of pre-existing Iranian-backed Iraqi militias, in order to conduct attacks on Gulf countries hosting US forces, according to eight Iraqi sources speaking to Reuters on June 19.[24] The sources included two Iraqi military officials, a security official, and five local militia commanders.[25] Three of the sources said that three or four of these new cells, each containing around 10 “elite” Iraqi Shia fighters, launched at least seven drone attacks targeting the Gulf countries between April 20 and May 17 from desert areas in southern Iraq.[26] The sources said that these attacks included three attacks targeting Kuwait, two targeting the United Arab Emirates (UAE), and two targeting Saudi Arabia.[27] The IRGC-directed militia cells targeted Kuwait’s Ali al Salem Airbase and a military terminal at Kuwait’s international airport.[28] The UAE and Saudi Arabia reportedly intercepted all of the attacks launched by IRGC-directed militia cells at their territory. ISW-CTP assessed in mid-April that Iranian-backed Iraqi militias were likely responsible for some of the drone strikes against the Gulf states.[29] The IRGC-directed militia attacks against the Gulf states were probably intended, in part, to further Iran’s efforts to drive a wedge between the Gulf states and the United States. Iranian-backed Iraqi militias conducted up to half of the roughly 1,000 drone attacks targeting Saudi Arabia during the war, according to an unnamed source speaking to the *Wall Street Journal* on April 21.[30]

The new militia cells reportedly contain multiple Islamic Resistance in Iraq members who operate outside of this coalition’s command structure and directly report to the IRGC.[31] This engagement represents a deviation from the IRGC’s historical pattern of engagement with Iraqi militias. The five local militia commanders told Reuters that Iran’s establishment of these cells reflects a shift in the IRGC’s tactics and is aimed at projecting Iranian force across the region.[32] The IRGC Quds Force has typically directly worked with Iraqi militia leaders and commanders, not cells of

fighters who don't report to an Iraqi militia.[33] Iran's established Iraqi partners conducted numerous attacks on US and foreign targets in Iraq and the region, including the Gulf countries, during the war.[34] Unspecified Iraqi sources told Saudi media in April that IRGC Quds Force officers "constantly" supervised militia attacks, helped militias develop ammunition for drones, and provided militias with technical expertise regarding missiles.[35] One source added that IRGC officers provided daily target lists to Iraqi militias that recommended the timing and amount of ammunition to use for attacks.[36]

Iran reportedly formed these new militia cells to deflect responsibility for attacks from established militias amid increased US pressure on the Iraqi federal government to disarm Iraqi militias. The Iraqi sources told Reuters that the IRGC created the cells to maintain plausible deniability, deflect blame from established Iranian-backed Iraqi militias, and reduce US pressure on the Iraqi federal government to disarm the militias.[37] The United States has increased pressure on the Iraqi federal government in recent months to disarm the militias. The US Treasury Department halted shipments of Iraq's oil revenue held in the US Federal Reserve during the war due to militia attacks against US forces.[38] The United States has also seemingly conditioned economic support for Prime Minister Ali al Zaydi's government on its ability to disarm the militias and dismantle their financial networks.[39] The Iraqi federal government has taken initial steps towards restricting arms to the state in recent weeks, including by forming a joint disarmament committee.[40] The PMF is an Iraqi state security service that includes many Iranian-backed Iraqi militias, such as Asaib Ahl al Haq and Kataib al Imam Ali, that answer to Iran instead of the Iraqi prime minister.[41] Asaib Ahl al Haq and Kataib al Imam Ali have both recently indicated their willingness to disarm.[42]

It is also possible that Iran formed these new militia cells as part of an initial effort to build a new, loyal cadre of ideological militias over which Iran has strong control and would supplement the political activity of existing Iranian-backed Iraqi actors. A retired Iraqi army general told Reuters that the new cells appear "smaller, more ideologically hardened, and more tightly controlled." [43] Iraq analysts Michael Knights and Crispen Smith also noted in a May 2026 report that there is a growing trend of the IRGC Quds Force directly running Iraqi militia cells composed of militia members from different groups.[44] Iran has previously established splinter groups from previous organizations to ensure loyalty to Iran.[45] Iran helped split Kataib Hezbollah and Asaib Ahl al Haq from Iraqi Shia nationalist cleric Muqtada al Sadr's Jaysh al Mahdi after 2006, as Jaysh al Mahdi became less responsive to Iranian control, for example.[46] UK-based Amwaj media reported in November 2025 that Iran has encouraged unspecified Iranian-backed Iraqi militias to shift their focus from armed resistance to political engagement.[47] An Iranian-backed Iraqi militia source told Amwaj media that Iran would consider supporting and had provided funding to smaller Iraqi militias that are not affiliated with the PMF, and thus fully outside of state structures and control.[48] Unspecified informed sources told Iraqi media on May 5 that IRGC Quds Force Commander Brigadier General Esmail Ghaani has similarly suggested that multiple Iraqi militias, including Kataib Hezbollah, Harakat Hezbollah al Nujaba, and Kataib Sayyid al Shuhada, end their kinetic activity in exchange for maintaining the PMF's role within the Iraqi state.[49] These specific militias have repeatedly refused to disarm, however.[50]

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

An unspecified senior Iranian military official highlighted the effectiveness of Iranian ballistic missiles equipped with cluster munition warheads during the recent war in an interview with Iranian media, which highlights how Iran will use this and other lessons it learned during the war to inform its future military planning.[51] The official stated in an interview with regime outlet Nour News that Iran employed several types of drone and missile systems during the conflict, and specifically highlighted the use of ballistic missiles equipped with cluster munitions.[52] The official argued that military success depends on Iran’s ability to sustain pressure on US and Israeli air defense systems and that ballistic missiles equipped with cluster munitions can “saturate [air] defense systems.” Iran launched numerous missiles equipped with cluster munitions at Israel during the conflict.[53] A single Iranian cluster-munition warhead created more than 30 separate impact sites in one instance.[54] ISW-CTP previously assessed that Iran likely opted to use cluster munitions because they are harder to intercept and cause extensive damage in a general area.[55] Iranian leaders also likely recognized that they could not reliably generate the mass needed to defeat Israeli air defenses and destroy discrete military targets with regular missiles.[56]

Iran’s Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See topline section.

Other Axis of Resistance Activity

An Iraqi Ministry of Defense (MoD) official appeared to confirm that some weapons that the Iraqi federal government will receive as part of its efforts to restrict arms to the state could be supplied to the Iranian-backed Popular Mobilization Forces (PMF).[57] The PMF is an Iraqi state security service that includes many Iranian-backed Iraqi militias. MoD Director of Media and Moral Guidance Major General Tahsin al Khafaji told the Iraqi News Agency on June 18 that the federal government’s process for restricting arms to the state includes administrative and armament components.[58] The administrative components include determining positions within the Iraqi security establishment to grant to, presumably, militia members who disarm.[59] The Shia Coordination Framework reportedly approved Iraqi Prime Minister Ali al Zaydi’s recent plan to offer 35,000 jobs within Iraq’s security establishment to militia members willing to disarm.[60] Khafaji said the armament component involves receiving and distributing light, medium, and heavy weapons to the MoD, the Ministry of Interior, and potentially other “addresses operating within the framework” of the prime minister, which presumably refers to the PMF.[61] Iranian-backed Iraqi militias within the PMF answer, on

paper, to the prime minister but, in reality, follow Iranian direction.[62]

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Endnotes

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Iran Update Special Report, June 20, 2026



Katherine Wells, Nidal Morrison, Ben Rezaei, Parker Hempel, Ria Reddy, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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

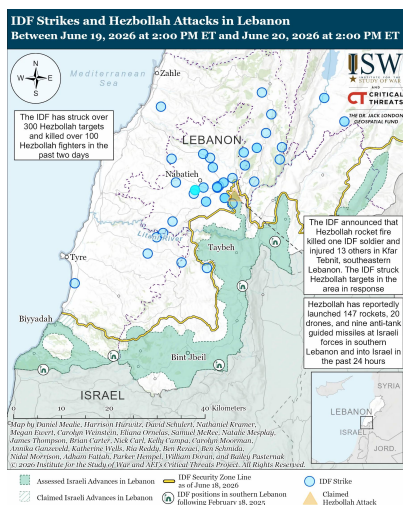
Key Takeaways

1. An Iranian negotiating delegation arrived in Switzerland on June 20 to discuss the implementation of the US-Iran memorandum of understanding (MoU) with US negotiators. Iran will likely use these talks to try to pressure the United States to compel Israel to cease military operations against Hezbollah in Lebanon. It is unclear if Iran's negotiating delegation will discuss the Iranian nuclear program in Switzerland.
2. The Iranian delegation will likely use Iran's renewed closure of the Strait of Hormuz as leverage in the talks to try to pressure the United States to compel Israel to halt operations against Hezbollah in Lebanon. Iran likely calculates that it can use the strait as a tool to put greater economic pressure on the United States to meet Iranian demands.
3. Israel and Hezbollah continued to launch attacks targeting each other despite agreeing to a ceasefire on June 19. The Israel Defense Forces (IDF) warned that it is committed to the ceasefire but will continue to "forcefully" strike Hezbollah if the group launches further attacks against Israeli forces.
4. There are some indications of disagreements within the Iranian regime regarding Iran's participation in talks. The Iranian regime has a vested interest in maintaining the negotiating process under the MoU because Iran is receiving economic relief, such as sanctions waivers, as part of the agreement.
5. The composition of the Iranian negotiating delegation indicates that Iran intends to discuss economic relief components of the MoU at the talks. Iran would almost certainly use any economic relief to try to reconstitute its defense and military capabilities and the Axis of Resistance. Iran may also calculate that the United States would have less leverage to extract concessions from Iran on its nuclear program during the 60-day negotiations period if Iran can frontload economic relief.

Toplines

An Iranian negotiating delegation arrived in Switzerland on June 20 to discuss the

ceasefire on June 19. Israeli Prime Minister Benjamin Netanyahu stated on June 20 that Israel will remain in the IDF security zone in southern Lebanon “as long as necessary to defend [Israel’s] northern border.”[9] Hezbollah continues to launch rocket, drone, anti-tank guided missile, and artillery attacks targeting IDF positions in southern Lebanon.[10] Israeli Ambassador to the United States Michael Leiter reported that Hezbollah has launched 147 rockets, 20 drones, and nine anti-tank guided missiles at Israeli forces in southern Lebanon and into Israel in the past 24 hours.[11] The IDF announced that a Hezbollah rocket attack killed an IDF soldier and injured 13 others near Kfar Tebnit in southeastern Lebanon.[12] IDF forces also engaged Hezbollah fighters near Ali al Taher on June 20.[13] Netanyahu’s office reported that the IDF has struck over 300 Hezbollah targets and killed over 100 fighters in the past two days in response to Hezbollah attacks on Israeli soldiers.[14] CTP-ISW observed a significant increase in Israeli airstrikes between June 19 and 20 compared to recent days.[15] Netanyahu’s office and the IDF warned that it is committed to the ceasefire but will continue to “forcefully” strike Hezbollah if the group launches further attacks against Israeli forces.[16]



There are some indications of disagreements within the Iranian regime regarding Iran’s participation in the talks. IRGC-affiliated outlet Tasnim News Agency stated that Araghchi has “no justification” for going to Switzerland because the United States has not fulfilled its commitment to secure a ceasefire on all fronts.[17] This report suggests that some elements within the Iranian regime oppose talks with the United States until the United States pressures Israel to cease operations against Hezbollah and withdraws from Lebanon. The Iranian negotiating delegation presumably received approval from key decision-makers within the regime, specifically Iranian Supreme Leader Mojtaba Khamenei and/or IRGC Commander Major General Ahmad Vahidi, to attend the talks in Switzerland. There are several reasons why these leaders may have approved the talks. The Iranian regime has a vested interest in maintaining the negotiations process under the MoU because Iran is receiving economic relief, such as sanctions waivers, as part of the agreement. Iran may also seek to avoid appearing as the party obstructing negotiations.

The composition of the Iranian negotiating delegation indicates that Iran intends to discuss economic relief components of the MoU at the talks. The inclusion of Central Bank Governor Abdolnaser Hemmati and Deputy Oil Minister and National Iranian Oil Company Chairman Hamid Bord in Iran’s delegation highlights how the Iranian regime intends to focus part of the talks in Switzerland on economic issues, such as the lifting of sanctions and release of Iran’s frozen assets.[18] Iranian officials and media have emphasized the need to secure economic relief in the early stages of the implementation of the MoU.[19] Iran would almost certainly use any economic relief to try to reconstitute its defense and military capabilities and the Axis of Resistance.[20] Iran may also calculate that the United States would have less leverage to extract concessions from Iran on its nuclear program during

the 60-day negotiations period if Iran can frontload economic relief.

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

See topline section.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

See topline section.

Other Axis of Resistance Activity

Iraqi Prime Minister Ali al Zaydi appointed a new National Security Service chief and national security adviser on June 18.[21] Zaydi appointed Accountability and Justice Commission (AJC) head Mohammad al Badri as the National Security Service (NSS) chief.[22] Badri, who is a member of former Prime Minister and State of Law Coalition leader Nouri al Maliki's Dawa Party, has served as the AJC chief since 2013.[23] Iranian-backed Iraqi actors have long weaponized the AJC, which replaced the de-Baathification Committee in 2008 to prevent "the return of the Baath's ideology, power, or practices," to sideline political opponents.[24] Iraq analysts have previously assessed that Iranian-aligned Iraqi actors have similarly coopted the NSS since its formation following the 2003 US invasion of Iraq.[25] Badri's predecessor, Abdul Karim al Basri, is also a Dawa Party member with ties to the IRGC Quds Force.[26] Zaydi also appointed judge Qasem al Aboudi as national security adviser, replacing Iranian-backed Badr Organization-affiliated Qasem al Araji.[27] Iraqi media reported on June 20 that Zaydi appointed Araji as his "special security adviser." [28]

The Iraqi government has taken initial steps to strengthen its anti-money laundering and counter-terrorist financing measures following US Special Envoy to Iraq and Syria Tom Barrack's meeting with Zaydi on June 15.[29] Iraqi media reported on June 18 that Zaydi replaced the current Central Bank of Iraq (CBI) governor with CBI Anti-Money Laundering and Counter-Terrorism Financing Office head Nizar Nasser.[30] The CBI is responsible for implementing anti-money laundering

and counter-terrorist financing reforms.[31] A US government official told Iraqi media on June 19 that the Iraqi government has also agreed to cooperate with the Financial Action Task Force (FATF) to combat money laundering, terrorist financing, and corruption.[32] The FATF stated on June 19 that Iraq made a “high-level” commitment to work with the FATF to improve the effectiveness of Iraq’s anti-money laundering and counter-terrorist financing measures.[33] These steps come after Barrack reportedly demanded that the Iraqi government dismantle Iraqi militia-associated financial networks and combat corruption during his meeting with Zaydi.[34]

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