

Iran Update Special Report, June 21, 2026



Ben Rezaei, Nidal Morrison, Parker Hempel, Adham Fattah, 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 cover events from the past 24-hour period.

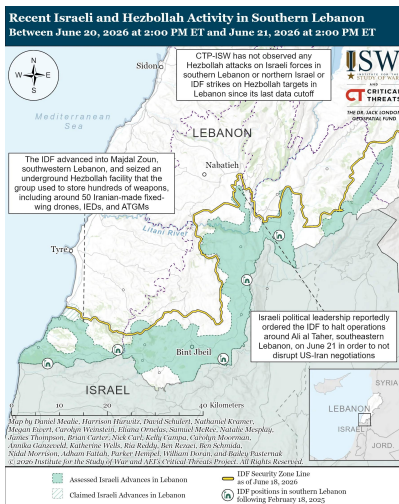
Key Takeaways

1. Iran is attempting to use the sequencing of the US-Iran memorandum of understanding's (MoU) clauses to make the United States meet Iranian demands regarding Lebanon and economic relief before Iran agrees to discuss nuclear issues.
2. Iran and the United States held quadrilateral talks with Qatari and Pakistani mediators in Burgenstock, Switzerland, on June 21. Iranian officials and media emphasized that the June 21 talks only focused on pushing the United States to implement MoU clauses that the MoU states must be implemented before nuclear negotiations can begin.
3. Iran is using the first clause of the MoU, which calls for a ceasefire on all fronts, to try to compel the United States to pressure Israel to cease operations against Hezbollah in Lebanon and withdraw its forces from Lebanese territory. Iran's interpretation of this clause is part of its broader effort to preserve Hezbollah as a central element of Iran's deterrence strategy against Israel.
4. Israeli and Hezbollah attacks have largely paused since June 20, but Israeli forces continue clearing operations within the Israel Defense Forces' (IDF) "security zone" in southern Lebanon.
5. Iran is also attempting to frontload economic benefits from the MoU before addressing its nuclear file in negotiations. Iran likely seeks to acquire funds up front in case negotiations collapse and likely also seeks to reduce US leverage in later nuclear talks in order to make it more difficult for the United States to extract concessions from Iran.
6. Iran is using its announced closure of the Strait of Hormuz to increase economic pressure on the United States as part of its effort to push the United States to compel Israel to halt operations against Hezbollah and withdraw from Lebanon.
7. Iran's involvement in negotiations in Switzerland has exposed fissures among some Iranian factions over how Iran should advance its objectives.

Toplines

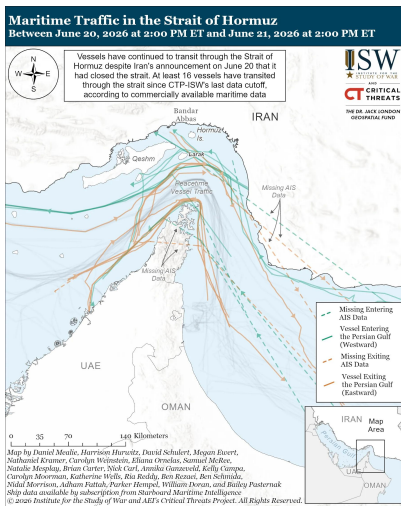
Iran is attempting to use the sequencing of the US-Iran memorandum of understanding's (MoU) clauses to make the United States meet Iranian demands regarding Lebanon and economic relief before Iran agrees to discuss nuclear issues. Iran and the United States held quadrilateral talks with Qatari and Pakistani mediators in Burgenstock, Switzerland, on June 21.[1] Qatari officials stated that the parties established “specialized technical and expert working groups” to negotiate a final agreement covering “all aspects” of the MoU.[2] Iranian officials and media emphasized that the June 21 talks only focused on pushing the United States to implement MoU clauses that the MoU states must be implemented before nuclear negotiations can begin, however.[3] Islamic Revolutionary Guards Corps (IRGC)-affiliated Fars News reported on June 21 that no members of Iran’s “nuclear committee” were part of the Iranian delegation.[4] Iranian negotiating team member Hossein Ghorban Zadeh said that the talks focused on implementing clause 13 of the MoU, which states that Iran and the United States will only start negotiations for a final agreement once clauses 1, 4, 5, 10, and 11 are implemented.[5] These clauses concern the ceasefire on all fronts, including Lebanon, the lifting of the US naval blockade, the reopening of the Strait of Hormuz, temporary oil sanctions waivers, and the release of frozen Iranian assets.[6] Ghorban Zadeh emphasized that a ceasefire in Lebanon is Iran’s “top priority” and that progress on other aspects of the MoU depends on this ceasefire.[7] Iran’s conditions in these talks demonstrate how Iran is using the MoU’s sequencing to demand that the United States fulfil its commitments in the MoU before Iran agrees to discuss its nuclear program. Iranian officials and media have repeatedly emphasized that Iran must solidify its military gains in the war in negotiations by using negotiations to secure Iran’s strategic objectives, which include preserving Hezbollah and the Axis of Resistance writ large as well as securing Iranian control over the Strait of Hormuz.[8] The talks reportedly paused after US President Donald Trump threatened Iran that the United States would strike Iran “harder” if Iran does not stop Hezbollah, which prompted the Iranian team to temporarily withdraw to its hotel “in protest,” according to Iranian media.[9] An unspecified diplomat told Axios on June 21 that the Iranian delegation had not left the venue and that US-Iran negotiations were ongoing, however.[10]

Iran is using the first clause of the MoU, which calls for a ceasefire on all fronts, to try to pressure the United States to compel Israel to cease operations against Hezbollah in Lebanon and withdraw its forces from Lebanese territory. Iran’s interpretation of this clause is part of its broader effort to preserve Hezbollah as a central element of Iran’s deterrence strategy against Israel. Iranian officials have interpreted the first clause of the MoU as requiring both a halt to Israeli operations against Hezbollah and an Israeli withdrawal from southern Lebanon.[11] This interpretation creates a win-win situation for the regime: if the United States agrees to Iran’s interpretation and compels Israel to withdraw its forces from Lebanon, this would represent a strategic victory for Iran and Hezbollah. If, on the other hand, the United States does not accept Iran’s interpretation of this clause, Iran can continue to postpone nuclear negotiations by claiming that the United States is violating the MoU. Hezbollah-affiliated parliamentarians have stated that the US-Iran MoU provides a path to a complete ceasefire in Lebanon and Israeli withdrawal from Lebanon.[12] Israeli and Hezbollah attacks have paused since June 20, but Israeli forces continue clearing operations within the Israel Defense Forces’ (IDF) “security zone” in southern Lebanon.[13] The current ceasefire in Lebanon will likely not satisfy Iran’s maximalist demands because Israeli officials continue to emphasize that the IDF will remain in southern Lebanon, however.[14] Israeli media reported on June 21 that the United States is pushing the IDF to withdraw to positions at and behind the Yellow Line, which denotes the extent of the IDF’s military buffer zone in Lebanon.[15] Israeli media added that Israeli political officials instructed the IDF to halt operations around Ali al Taher in order to avoid disrupting US-Iran negotiations.[16]



Iran is also attempting to frontload economic benefits from the MoU before addressing its nuclear program in negotiations. Iran likely seeks to acquire funds up front in case negotiations collapse and also likely seeks to reduce US leverage in later nuclear talks in order to make it more difficult for the United States to extract concessions from Iran. Iran could use early access to oil revenue and frozen assets to reduce US leverage during the 60-day nuclear negotiations period and try to reconstitute its military capabilities and the Axis of Resistance.[17] Fars News reported that Iran is still expecting the United States to release \$12 billion USD in Iranian assets, which Fars News claimed includes a planned \$500 million USD “test purchase” from Iranian assets in Qatar.[18] The Iranian Central Bank also confirmed that Central Bank Governor Abdolnaser Hemmati joined the Iranian delegation in Switzerland to work on the release of the \$6 billion USD that is blocked in Qatar.[19] ISW-CTP previously assessed on June 20 that Hemmati’s inclusion in the Iranian delegation indicated that Iran intended to focus part of the talks in Switzerland on economic relief.[20]

Iran is using its announced closure of the Strait of Hormuz to increase economic pressure on the United States as part of its effort to push the United States to compel Israel to halt operations against Hezbollah and withdraw from Lebanon. The IRGC Navy announced on June 20 that it had “closed” the strait, but some vessels continue to transit through the Omani coastal route and Iran’s newly asserted traffic separation scheme.[21] Commercially available maritime data indicates that 16 vessels passed through the strait between 1400 ET on June 20 and 1400 ET on June 21 despite Iranian claims that the strait remains closed.[22] The fact that shipping through the strait has continued after Iran announced the closure of the strait suggests that this announcement was likely intended to primarily have an informational effect. Iran’s announcement increased global oil prices, and the Iranian regime likely calculated that an increase in oil prices would increase pressure on the United States to meet Iranian demands.[23] Iranian Supreme Leader Adviser Mohammad Mokhber highlighted on June 21 how Iranian control over the Strait of Hormuz enables Iran to “significantly influence the global economy.”[24] Mokhber added that Iran seeks to alter “the rules governing the strait.”



Iran's involvement in negotiations in Switzerland has exposed fissures among some Iranian factions over how Iran should advance its objectives. IRGC-affiliated outlet Fars News published an op-ed on June 20 that criticized IRGC-affiliated outlet Tasnim News Agency for allegedly supporting Iranian negotiating delegation head Parliament Speaker Mohammad Bagher Ghalibaf and advancing Ghalibaf's pro-negotiations agenda.[25] Fars News also accused Tasnim of misinterpreting a recent statement from Supreme Leader Mojtaba Khamenei in which Khamenei suggested that he did not fully support the MoU.[26] Fars News' claim that Tasnim is affiliated with Ghalibaf is inconsistent with recent Tasnim reports that have argued that Iran shouldn't conduct negotiations with the United States until the United States achieves a ceasefire in Lebanon. Tasnim argued on June 20 that Foreign Affairs Minister Abbas Araghchi had "no justification" to go to Switzerland, for example.[27]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

Iranian media continues to reflect on aspects of the recent war that it assesses contributed to Iran's "success" against the United States and Israel. Iranian Armed Forces General Staff-run media Defa Press published an op-ed on June 21 in which it described the effectiveness of Iran's "mosaic defense" strategy in countering US and Israeli airstrikes during the war.[28] Iran's "mosaic defense" strategy dates back to 2005 under former IRGC Commander Mohammad Ali Jafari and involves the decentralization of military decision-making to lower echelons.[29] Defa noted that, unlike traditional, centralized defense models that depend on heavy equipment and rigid command structures, Iran's "mosaic defense" relies on numerous small, low-cost, and flexible units—such as drones, radars, and missile platforms—that can operate independently yet cohesively with other units.[30] Defa emphasized that, in this structure, losses of individual components do not compromise the overall network.[31] Defa also highlighted how systems, such as Shahed drones, that are relatively cheap to produce, can pose financial strain on Iran's adversaries by making them invest in costly countermeasures.[32]

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

Unspecified actors conducted a drone attack targeting Sunni Progress Party member and Iraqi Parliament Speaker Haibat al Halbousi in Anbar Province, Iraq, on June 20.[33] The Iraqi Joint Operations Command (JOC) Security Media Cell announced on June 20 that a “very small drone” crashed near Halbousi’s house in Karmah District, Anbar Province, causing a small fire but no major damage.[34] The JOC stated that “technical intelligence” indicates that the drone was not carrying explosives.[35] No Iraqi group has claimed responsibility for the attack at the time of this writing.

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Iran Update Special Report, June 22, 2026



Katherine Wells, Adham Fattah, Kelly Campa, Benjamin Schmida, William Doran, 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. The structure of the newly established “deconfliction cell” to oversee the ceasefire in Lebanon appears to constrain Israeli action against Hezbollah by eliminating the post-2024 ceasefire monitoring mechanism, which allowed Israel to act against Hezbollah ceasefire violations in certain circumstances. Both Iran and Hezbollah could materially benefit from a constrained Israeli ability to confront Hezbollah.
2. Iran has secured economic relief through a US Treasury Department sanctions waiver for Iranian oil and petrochemical exports and a reported Iran-Qatar memorandum of understanding that facilitates the unfreezing of Iranian assets.
3. Iran does not appear to have made any nuclear concessions in the June 21 talks in Switzerland. An Iranian official reiterated that the United States must fulfill other MoU clauses, such as the ceasefire on all fronts and economic relief clauses, in order to “pave the way for the implementation of mutual obligations.” The official’s comments are consistent with how Iran is attempting to condition nuclear talks on economic relief and the United States compelling Israel to end operations and withdraw from Lebanon.
4. The US and Iranian delegations agreed on June 21 to establish a line of communication to prevent military incidents in the Strait of Hormuz as commercial vessels transit through the strait. IRGC-affiliated media claimed on June 21 that this line of communication — which appears to be designed mainly to avoid maritime incidents or miscommunication — establishes Iran’s sovereignty over the strait.

Toplines

The structure of the newly established “deconfliction cell” to oversee the ceasefire in Lebanon appears to constrain Israeli action against Hezbollah by eliminating the post-2024 ceasefire monitoring mechanism, which allowed Israel to act against Hezbollah ceasefire

violations in certain circumstances. Iran secured a number of gains from the quadrilateral talks with the United States, Qatar, and Pakistan in Switzerland on June 21. One of these gains includes the establishment of a “deconfliction cell” to oversee the ceasefire in Lebanon that excludes Israel and appears to replace a previous monitoring mechanism that enabled Israeli operations in Lebanon under the November 2024 ceasefire.[1] The new mechanism includes the United States, Iran, Qatar, the Lebanese government, and Pakistan. The previous mechanism, often referred to as the “ceasefire monitoring committee,” enabled Israel to conduct operations against Hezbollah and degrade the threat Hezbollah posed to Israel following Israel’s defeat of Hezbollah in 2024.[2] This mechanism included Israel, Lebanon, the United States, France, and the United Nations Interim Force in Lebanon (UNIFIL).[3] Israel, under this mechanism, reported Hezbollah ceasefire violations to the mechanism in order for the Lebanese Armed Forces (LAF) to address the violations.[4] Israel took action to neutralize the Hezbollah threats with force when the LAF failed to address or insufficiently addressed the Hezbollah violations, which frequently occurred.[5] Israeli media reported that the newly agreed-upon mechanism between the United States, Iran, Qatar, and Pakistan is designed to replace the former ceasefire monitoring committee. It is unclear how the newly established deconfliction cell will function. **The disempowerment of the former mechanism in favor of a new “deconfliction cell” that excludes Israel nonetheless benefits Iran because it removes a recognized forum in which Israel raised Hezbollah violations and acted against them if necessary. Both Iran and Hezbollah could materially benefit from a constrained Israeli ability to confront Hezbollah.**

The inclusion of Iran and exclusion of Israel in the “deconfliction cell” will seriously challenge the cell’s ability to achieve its stated objective of ensuring the “termination of military operations” in Lebanon.[6] Both actors are actively involved in combat operations in southern Lebanon. Iran reportedly deployed Islamic Revolutionary Guards Corps (IRGC) officers to Maroun al Ras to help coordinate Hezbollah’s defense against Israel Defense Forces (IDF) advances in southern Lebanon, according to a senior Israeli source speaking to regional media on June 22.[7] These IRGC deployments are consistent with recent reports that IRGC officers have embedded themselves in Hezbollah’s command structure in order to rebuild the group following Hezbollah’s defeat in Fall 2024.[8] The IDF continues to operate against Hezbollah on the ground in southeastern Lebanon.[9] Iran’s involvement in the conflict will enable it to directly relay intelligence and information from southern Lebanon to the “deconfliction cell.” Israel will only be able to indirectly relay information to the “deconfliction cell” via the United States, however. Israel was previously able to directly raise issues to the November 2024 monitoring mechanism.[10]

The conflicting positions of the deconfliction cell’s member states will also challenge the mechanism’s ability to secure an end to military operations in Lebanon. The United States is reportedly allowing Israel to maintain a military presence in southern Lebanon, according to Israeli media citing Israeli sources. Right-wing Israeli media reported on June 22 that Israeli and US officials have agreed that the IDF will remain in southern Lebanon for an unspecified period of time to continue clearing Hezbollah infrastructure in areas within the IDF’s military buffer zone.[11] Left-leaning Israeli media reports indicated on June 21 that the IDF is considering “a symbolic withdrawal” from areas of southern Lebanon beyond the Yellow Line — which refers to the extent of the IDF’s “security zone” in Lebanon—as a gesture to the Lebanese government.[12] Israeli Prime Minister Benjamin Netanyahu and Defense Minister Israel Katz continue to insist that Israel has the right to protect itself and that this includes maintaining a presence in southern Lebanon to combat Hezbollah and conduct clearing operations.[13] Iran continues to demand a full ceasefire that includes a complete IDF withdrawal from southern Lebanon, however.^[14] Israeli, US, and Lebanese delegations^[14] will probably discuss the scope of Israeli military operations in Lebanon and the new “deconfliction cell” in Israel-Lebanon ceasefire talks in Washington, DC, between June 23 and 25.[15]

Iran has also secured economic relief through a US Treasury Department sanctions waiver for Iranian oil and petrochemical exports and a reported Iran-Qatar memorandum of understanding (MoU) that facilitates the unfreezing of Iranian assets. The US Treasury Department issued a waiver on June 22 for Iranian crude oil and petrochemical exports through August 21. The waiver includes associated services such as banking transactions, insurance, and transportation. The waiver does not apply to Iranian exports to North Korea, Cuba, and Russian-occupied parts of Ukraine.[16] The United States had already committed to the sanctions waiver as part of the US-Iran MoU that the United States and Iran signed on June 17.[17] Iranian media separately reported that Iran and Qatar signed a separate MoU for Qatar to unfreeze Iranian assets.[18] Qatar has not acknowledged this claim as of this writing. US Vice President JD Vance told reporters on June 22 that Iran would use unfrozen funds to purchase US agricultural products if the United States unfroze the funds.[19] Iranian media subsequently denied Vance’s comments, however.[20]

Iran does not appear to have made any nuclear concessions in the June 21 talks in Switzerland. Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei told reporters on June 22 that both the US and Iranian delegations expressed their countries’ views on Iran’s nuclear program but did not negotiate on their positions during the June 21 talks.[21] Baghaei reiterated that the United States must fulfill other MoU clauses, such as the ceasefire on all fronts and economic relief clauses, in order to “pave the way for the implementation of mutual obligations.” Baghaei was likely referencing negotiations about Iran’s nuclear program, which is consistent with how Iran is attempting to condition nuclear talks on economic relief and the United States compelling Israel to end operations and withdraw from Lebanon.[22] US President Donald Trump suggested on June 22 that Iran will have to agree to International Atomic Energy Agency (IAEA) inspections of nuclear sites.[23] Baghaei denied that Iran has made any “new commitments” over IAEA inspections and said that Iran’s interactions with the IAEA would remain under Iran’s existing legal frameworks, however.[24]

The US and Iranian delegations agreed on June 21 to establish a line of communication to prevent military incidents in the Strait of Hormuz as commercial vessels transit through the strait.[25] Islamic Revolutionary Guards Corps (IRGC)-affiliated media claimed on June 21 that this line of communication — which appears to be designed mainly to avoid maritime incidents or miscommunication — establishes Iran’s sovereignty over the strait.^[26] The regime may assess that this line of communication will require vessels to coordinate with Iran in order to safely pass through the strait and thereby implicitly recognize Iran’s sovereignty over the strait. Commercially available maritime data indicates that 25 vessels passed through the strait between 1400 ET on June 21 and 1400 ET on June 22, despite Iranian claims on June 20 that it had closed the strait due to Israeli “violations” of the ceasefire in Lebanon.[27]

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

Nothing significant to report.

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Endnotes

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Iran Update Special Report, June 23, 2026



Ria Reddy, Adham Fattah, William Doran, Nidal Morrison, Bailey Pasternak, Carolyn Moorman, Annika Ganzeveld

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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 taking steps to establish a joint mechanism with Oman to try to exercise long-term authority over the Strait of Hormuz. Such a mechanism would enable Iran to regulate transit through the strait and decide to restrict passage at its discretion. Recent increased vessel traffic through the strait does not eliminate the threats that Iranian control over the strait poses to US interests and global commerce.
2. Iranian regime officials have continued to deny that the United States could control how the regime spends any funds it obtains from the US-Iran memorandum of understanding (MoU). Any economic relief that the regime obtains could support Iranian efforts to reconstitute its military capabilities and the Axis of Resistance.
3. Iranian Supreme Leader Mojtaba Khamenei's Telegram channel reiterated the primary objectives that Iran seeks to achieve in the current conflict. These objectives include ending US military operations against Iran, making the United States lift its naval blockade on Iranian ports, consolidating Iranian sovereignty over the Strait of Hormuz, receiving US compensation for Iranian reconstruction, the lifting of all sanctions, "the resolution of nuclear issues," and Iranian access to frozen assets.
4. Recent Iranian reporting suggests that Major General Ali Abadi Abdollahi may now serve as the Armed Forces General Staff (AFGS) deputy chief and Khatam ol Anbia Central Headquarters commander simultaneously. Iranian media reports identifying Abdollahi as the AFGS deputy chief follow unconfirmed reports from December 2025 that Iranian leaders were considering merging the AFGS and Khatam ol Anbia Central Headquarters.
5. United States Central Command's (CENTCOM) proposed deconfliction initiative in Lebanon would operate at a disadvantage compared to Iran because the IRGC's on-the-ground presence in Lebanon likely enables Iran to identify and report alleged ceasefire violations to the newly established "deconfliction cell" faster than the United States. Israeli political leaders have expressed concern over the "deconfliction cell" due to Iran's role in the cell and Israel's exclusion from the mechanism.

regime spends any funds it obtains from the US-Iran memorandum of understanding (MoU). Any economic relief that the regime obtains could support Iranian efforts to reconstitute its military capabilities and the Axis of Resistance. Iranian Ambassador to the United Nations Ali Bahreini rejected on June 23 any US involvement in deciding how Iran could use unfrozen assets it gains access to from the MoU.[9] Iran's Central Bank Governor, Abdolnaser Hemmati, told regime media on June 23 that Iran has "no obligation" to buy US agricultural products under the terms of the MoU.[10] US Vice President JD Vance told reporters on June 22 that, if the United States unfroze Iranian assets, Iran would have to use the assets to purchase US agricultural products.[11] Regime officials have previously indicated that the regime could use any economic relief from the MoU to reconstitute Iran's military capabilities. Arab mediators told the *Wall Street Journal* on June 13 that IRGC Commander Major General Ahmad Vahidi, whom ISW-CTP continues to assess is leading regime decision-making, has insisted that Iran's frozen assets should not be "barred from military spending," for example.[12] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei similarly stated in May that Iran would use assets released under an agreement with the United States to advance its defense and military sectors, including Iran's missile and drone programs.[13]

Iranian Supreme Leader Mojtaba Khamenei's Telegram channel reiterated the primary objectives that Iran seeks to achieve in the current conflict.[14] The objectives include:

- Ending US military operations against Iran;
- Making the United States lift its naval blockade on Iranian ports;
- Consolidating Iranian sovereignty over the Strait of Hormuz;
- US compensation for Iranian reconstruction;
- The lifting of all sanctions;
- "The resolution of nuclear issues," likely referring to maintaining the Iranian nuclear program; and
- Iranian access to frozen assets.

Recent Iranian reporting suggests that Major General Ali Abadi Abdollahi may now serve as the Armed Forces General Staff (AFGS) deputy chief and Khatam ol Anbia Central Headquarters commander simultaneously. The Iranian media has not publicly announced a replacement for the AFGS deputy chief position since the current IRGC Commander Major General Ahmad Vahidi, who previously served as the AFGS deputy chief, was appointed as the IRGC deputy commander in December 2025.[15] Vahidi was appointed as IRGC Commander in March 2026.[16] Iranian media, including an AFGS-affiliated outlet, identified Abdollahi as the AFGS deputy chief in May and June 2026 while reporting that he had appointed new officials to positions within the Passive Defense Organization (PDO).[17] The PDO operates under the AFGS and develops and coordinates policies to protect Iranian civilian, military, and nuclear infrastructure from attacks.[18] Abdollahi's reported role as AFGS deputy chief in making these appointments is notable because the AFGS chief, rather than the deputy chief, has historically appointed senior PDO officials.[19] The Iranian media has not announced a new AFGS chief since Israeli strikes killed former AFGS Chief Major General Abdol Rahim Mousavi in February 2026.[20] Iranian media have simultaneously continued to identify Abdollahi as the commander of the Khatam ol Anbia Central Headquarters, a position to which he was appointed in September 2025, which suggests that Abdollahi may hold both positions concurrently.[21] Iranian media reports identifying Abdollahi as the AFGS deputy chief follow unconfirmed reports from December 2025 that Iranian leaders were considering merging the AFGS and Khatam ol Anbia Central Headquarters.[22] A single commander previously served as both the Khatam ol Anbia commander and AFGS chief before the regime separated the two organizations in 2016.[23] The regime may have decided to merge the AFGS and Khatam ol Anbia Central Headquarters as part of a broader effort to restructure the military establishment after the 12-day Israel-Iran War, which highlighted Iran's command-and-control issues.[24] Such a move would likely aim to increase coordination and reduce redundancies at the highest level of Iran's military

establishment.

United States Central Command’s (CENTCOM) proposed deconfliction initiative in Lebanon would operate at a disadvantage compared to Iran because the IRGC’s on-the-ground presence in Lebanon likely enables Iran to identify and report alleged ceasefire violations to the newly established “deconfliction cell” faster than the United States.[25] CENTCOM Spokesperson Captain Tim Hawkins told US media on June 23 that CENTCOM is monitoring kinetic activity in Lebanon for tactical deconfliction.[26] US media reported that CENTCOM’s monitoring mechanism is part of the newly established “deconfliction cell” to oversee the ceasefire in Lebanon.[27] The “deconfliction cell” includes both US and Iranian representatives, but no Israeli representation.[28] The United States does not have an on-the-ground presence in southern Lebanon, and its tactical monitoring efforts will thus presumably rely on the Israel Defense Forces (IDF). This reliance on the IDF for information would likely delay US awareness about ceasefire violations because IDF soldiers would need to report Hezbollah ceasefire violations to their superiors, who would in turn also need to notify their superiors until the report reaches a senior command echelon. The senior command echelon would presumably notify CENTCOM, which in turn would inform US officials in the “deconfliction cell.” Iran, however, has deployed IRGC Quds Force officers to southern Lebanon in the current conflict, which would likely reduce the time and complexity needed for IRGC officers to report incidents to Iranian officials involved in the “deconfliction cell.”[29] Iran may face some challenges with reporting incidents despite its overall advantage, however, because Hezbollah’s combat units are decentralized and maintain limited communication with other units and higher command echelons.[30] Being able to notify the “deconfliction cell” about incidents faster would enable Iran to provide its interpretation of incidents and thereby influence the narrative over incidents in the “deconfliction cell.”

Israeli political leaders have expressed concern over the “deconfliction cell” due to Iran’s role in the cell and Israel’s exclusion from the mechanism.[31] Israeli Ambassador to the United States Yechiel Leiter warned Lebanese and US officials at the start of US-brokered negotiations in Washington, DC, on June 23 that negotiations are failing to expel Iranian influence from Lebanon and risk offering Hezbollah a “new lease on life.”[32]

US-Iran Negotiations

Nothing significant to report.

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

Israeli and Lebanese officials met in Washington, DC, for the latest round of US-brokered negotiations on June 23.[33] International media reported that the talks will likely continue through June 25 and that Israeli, Lebanese, and US officials will discuss ceasefire measures, including plans to replace the IDF with the Lebanese Armed Forces (LAF) in "pilot zones" in southern Lebanon.[34] Israeli media reported on June 23 that the IDF will likely withdraw from limited specific areas in southern Lebanon and transfer control of these areas to the LAF.[35] The IDF first transferred control of Dibbine, Marjaayoun District, to the LAF and the United Nations Interim Force in Lebanon (UNIFIL) after withdrawing from the town on June 4.[36] Hezbollah Secretary General Naim Qassem said in a speech on June 23 that Hezbollah is cooperating "to the fullest extent" with the LAF and urged the Lebanese government to "take advantage" of Hezbollah as a partner force in Lebanon.[37] Qassem has previously claimed that Hezbollah would work with Lebanese authorities and urged the Lebanese government to align with the group, although Qassem has also frequently criticized the Lebanese government for pursuing Hezbollah's disarmament.[38]

The Israel Defense Forces (IDF) reported that it engaged two groups of Hezbollah fighters near Ali al Taher, Nabatieh District, on June 23. The IDF reported that its forces killed a group of Hezbollah fighters that advanced toward IDF positions near Ali al Taher.[39] The IDF also reported that it conducted a drone strike targeting four Hezbollah fighters in vehicles near IDF positions in Ali al Taher.[40] The IDF reported that this group of Hezbollah fighters "operated under civilian cover." [41] Hezbollah claimed that Israeli forces targeted civilians as they cleared roads and recovered bodies.[42] Hezbollah accused the IDF of violating the June 19 Israel-Lebanon ceasefire.[43] Israeli forces and Hezbollah last engaged each other on June 20.[44] Israeli Prime Minister Benjamin Netanyahu and the IDF warned on June 20 that Israel is committed to the ceasefire but will continue to "forcefully" strike Hezbollah if the group launches further attacks against Israeli forces.[45]

Other Axis of Resistance Activity

Iranian Ambassador to Iraq Mohammad Kazem Sadegh downplayed Iran's opposition to Iranian-backed Iraqi militia disarmament in an interview with Iraqi state media on June 22.[46] Sadegh claimed that Iran would respect any Iraqi government decision regarding militia disarmament and called the issue an "internal Iraqi matter," which contradicts previous reporting about Iran's position on the issue.[47] Unspecified political and informed security sources previously told US-funded, Arabic-language media on June 10 that Iran views Iraqi militias' possible disarmament as an issue related to the Axis of Resistance rather than merely an internal Iraqi matter.[48] The IRGC also reportedly told Iraqi militia leaders not to surrender their weapons and vowed that Iran would do "everything in its power" to keep the militias armed.[49] Sadegh's interview comes as the Iraqi federal government has recently taken initial steps to disarm Iranian-backed Iraqi militias, including forming a disarmament committee, amid increased US pressure on the Iraqi government to dismantle the militias.[50] 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 would likely further embed Iranian influence within the Iraqi state.[51]

Sadegh also attempted to deflect Iranian responsibility for Iranian-backed Iraqi militia attacks during the recent conflict.[52] He falsely claimed during the interview that Iran "did not ask any party to intervene" on its behalf during the war.[53] Eight Iraqi sources told Western media on June 19, however, that the IRGC formed multiple Iraqi militia cells that directly report to the IRGC, instead of pre-existing Iranian-

backed Iraqi militias, to conduct attacks on US forces in Gulf countries.[54] Unspecified Iraqi sources also 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.[55]

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Iran Update Special Report, June 25, 2026



Ria Reddy, Parker Hempel, Ben Rezaei, Bailey Pasternak, 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 cover events from the past 24-hour period.

Key Takeaways

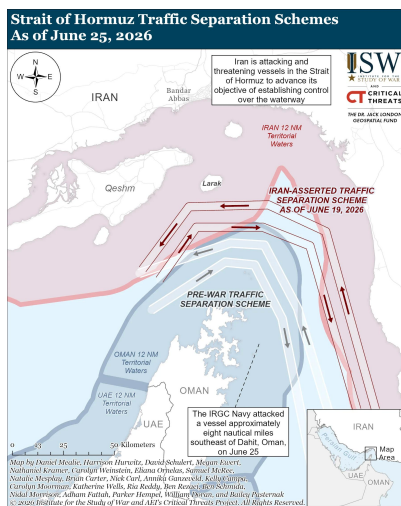
1. Iran is attacking and threatening vessels in the Strait of Hormuz to advance its objective of establishing control over the waterway. The recent attack and ongoing threats also likely seek to undermine international efforts to guarantee safe passage through the Strait of Hormuz.
2. Iran is using military threats and economic incentives to try to convince Gulf states to support its efforts to control the strait, but the Gulf states appear to be resisting Iranian pressure at present.
3. The United States and GCC foreign ministers issued a joint statement on June 25 that emphasized the importance of “free, unconditional, and unrestricted navigation” and rejected “any tolls, fees, or attempts to assert control over the strait. The statement explicitly opposes any payment requirement for transit through the strait and implicitly opposes any Iranian attempts to manage maritime traffic through measures such as its traffic separation scheme or requirements that vessels coordinate with the IRGC Navy.

Toplines

Iran is attacking and threatening vessels in the Strait of Hormuz to advance its objective of establishing control over the waterway. The Islamic Revolutionary Guards Corps (IRGC) Navy attacked a vessel approximately eight nautical miles southeast of Dahit, Oman, on June 25.[1] The attack came after the IRGC Navy issued a warning demanding that vessels coordinate with Iranian authorities and use the Iranian-approved traffic separation scheme.[2] The IRGC Navy warned that traffic outside these routes is “very dangerous” and implicitly threatened vessels that do not comply.[3] Iran likely seeks to use force and coercion to compel vessels to use its illegitimate traffic separation scheme and implicitly acknowledge Iranian control over the strait, which is a key objective for the regime.

The recent attack and ongoing threats also likely seek to undermine international efforts to guarantee safe passage through the Strait of Hormuz. The International Maritime Organization (IMO) and Oman announced a joint initiative on June 23 to help hundreds of stranded vessels transit the strait through a

designated safe route.[4] The IRGC Navy criticized the initiative as “unacceptable and completely dangerous,” likely because Iran assesses that a viable transit route outside Iranian territorial waters would weaken its ability to control maritime traffic and use the strait as leverage.[5] Commercially available maritime data indicates that at least 67 vessels transited the strait since ISW-CTP’s last data cutoff.[6] Forty-seven vessels used the IMO-Omani route along the Omani coast, while only ten used the Iranian-approved route, which illustrates how alternative transit routes may threaten Iran’s efforts to manage traffic through the strait unless Iran continues to fire on shipping or otherwise compel shipping to use its transit scheme.[7] The IMO paused its evacuation plan following the IRGC attack on the vessel.[8] One of the IMO’s key responsibilities is to designate safe maritime routes.[9] Iran may calculate that attacks on vessels could discourage countries and international organizations from facilitating such alternative transit routes.



Iran is using military threats and economic incentives to try to convince Gulf states to support its efforts to control the strait, but the Gulf states appear to be resisting Iranian pressure at present. The recent Iranian threats and attacks likely serve as an implicit warning to Gulf countries—particularly Oman, given the Omani-IMO efforts described above—that Iran will continue to attack international shipping if they do not cooperate with Iran. Iran used a similar strategy during the recent US-Iran War. Iran launched hundreds of drones and missiles at Gulf states during the war in order to try to influence their decision-making to achieve Iranian objectives, which included halting US operations against Iran and driving a wedge between the United States and its Gulf allies. Iran is currently trying to diplomatically induce and militarily compel these states into cooperation. Iranian Foreign Affairs Minister Abbas Araghchi held a phone call with Omani Foreign Minister Badr al Busaidi on June 25, likely as part of this broader diplomatic effort.[10] The US-Iran memorandum of understanding (MoU) requires Iran to coordinate with Oman and the other Gulf countries on the future management of the strait, which likely explains Iran’s efforts to do so in recent days.[11] Iran has also offered economic incentives to attract regional support for its plans for the strait. Iranian officials told the *Wall Street Journal* that Iran wants Gulf states to participate in a future system that would charge vessels for services in the strait and share the revenue.[12] Officials familiar with the proposal estimated that such fees could generate roughly 40 billion USD annually “for [the] states involved.”[13] It is not immediately clear whether this means 40 billion USD annually split between the states involved, or 40 billion USD annually per state.

The Gulf states appear to be resisting Iran’s efforts to control the strait and impose fees on maritime traffic, however. Delegations from the Gulf Cooperation Council (GCC), which includes Oman, Kuwait, Qatar, Saudi Arabia, Bahrain, and the United Arab Emirates, met with a US delegation led by Secretary of State Marco Rubio in Manama, Bahrain, on June 25 to discuss the US-Iran MoU and maritime security in

the strait, among other issues.[14] The United States and GCC foreign ministers issued a joint statement following the meeting that emphasized the importance of “free, unconditional, and unrestricted navigation” and rejected “any tolls, fees, or attempts to assert control over the strait.”[15] Iran has attempted to reframe tolls as “service fees” and has signaled its intention to impose such charges over the long term.[16] The joint statement addresses this distinction and opposes any payment requirement for transit through the strait. The statement also rejects efforts to control the strait more broadly, not merely the imposition of tolls.[17] This language implicitly opposes Iranian attempts to manage maritime traffic through measures such as its traffic separation scheme or requirements that vessels coordinate with the IRGC Navy. A senior UAE adviser similarly criticized Iranian efforts to impose a new reality in the strait and region.[18]

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US-Iran Negotiations

Nothing significant to report.

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

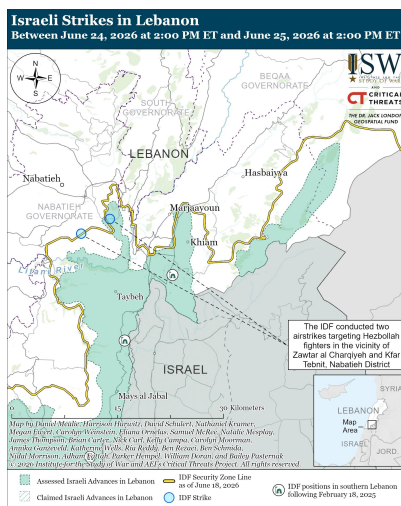
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Iran’s Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

US, Israeli, and Lebanese officials continue to discuss proposals for the Lebanese Armed Forces (LAF) to backfill Israel Defense Forces (IDF) positions in “pilot zones” in southern Lebanon as trilateral talks continue in Washington, DC, on June 25. Lebanese media reported on June 25 that the Israeli and Lebanese delegations have exchanged and rejected over ten proposals to establish “pilot zones” in southern Lebanon due to disagreements over the location and timeframe for

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Other Axis of Resistance Activity

Nothing significant to report.

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Endnotes

[1] https://x.com/UK_MTO/status/2070160682264269241

[2] <https://t.me/Tasnimnews/425336>

[3] <https://t.me/Tasnimnews/425336>

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[17] <https://www.gcc-sg dot org/en/MediaCenter/News/Pages/news-2026-6-25-10.aspx> ;

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<https://x.com/N12News/status/2068650641166119125> ;
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Iran Update Special Report, June 25, 2026



Ria Reddy, Parker Hempel, Ben Rezaei, Bailey Pasternak, 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 cover events from the past 24-hour period.

Key Takeaways

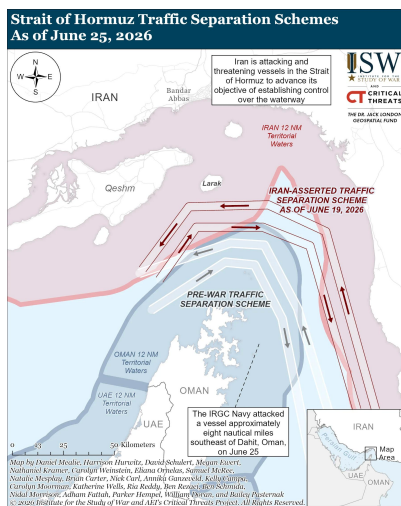
1. Iran is attacking and threatening vessels in the Strait of Hormuz to advance its objective of establishing control over the waterway. The recent attack and ongoing threats also likely seek to undermine international efforts to guarantee safe passage through the Strait of Hormuz.
2. Iran is using military threats and economic incentives to try to convince Gulf states to support its efforts to control the strait, but the Gulf states appear to be resisting Iranian pressure at present.
3. The United States and GCC foreign ministers issued a joint statement on June 25 that emphasized the importance of “free, unconditional, and unrestricted navigation” and rejected “any tolls, fees, or attempts to assert control over the strait. The statement explicitly opposes any payment requirement for transit through the strait and implicitly opposes any Iranian attempts to manage maritime traffic through measures such as its traffic separation scheme or requirements that vessels coordinate with the IRGC Navy.

Toplines

Iran is attacking and threatening vessels in the Strait of Hormuz to advance its objective of establishing control over the waterway. The Islamic Revolutionary Guards Corps (IRGC) Navy attacked a vessel approximately eight nautical miles southeast of Dahit, Oman, on June 25.[1] The attack came after the IRGC Navy issued a warning demanding that vessels coordinate with Iranian authorities and use the Iranian-approved traffic separation scheme.[2] The IRGC Navy warned that traffic outside these routes is “very dangerous” and implicitly threatened vessels that do not comply.[3] Iran likely seeks to use force and coercion to compel vessels to use its illegitimate traffic separation scheme and implicitly acknowledge Iranian control over the strait, which is a key objective for the regime.

The recent attack and ongoing threats also likely seek to undermine international efforts to guarantee safe passage through the Strait of Hormuz. The International Maritime Organization (IMO) and Oman announced a joint initiative on June 23 to help hundreds of stranded vessels transit the strait through a

designated safe route.[4] The IRGC Navy criticized the initiative as “unacceptable and completely dangerous,” likely because Iran assesses that a viable transit route outside Iranian territorial waters would weaken its ability to control maritime traffic and use the strait as leverage.[5] Commercially available maritime data indicates that at least 67 vessels transited the strait since ISW-CTP’s last data cutoff.[6] Forty-seven vessels used the IMO-Omani route along the Omani coast, while only ten used the Iranian-approved route, which illustrates how alternative transit routes may threaten Iran’s efforts to manage traffic through the strait unless Iran continues to fire on shipping or otherwise compel shipping to use its transit scheme.[7] The IMO paused its evacuation plan following the IRGC attack on the vessel.[8] One of the IMO’s key responsibilities is to designate safe maritime routes.[9] Iran may calculate that attacks on vessels could discourage countries and international organizations from facilitating such alternative transit routes.



Iran is using military threats and economic incentives to try to convince Gulf states to support its efforts to control the strait, but the Gulf states appear to be resisting Iranian pressure at present. The recent Iranian threats and attacks likely serve as an implicit warning to Gulf countries—particularly Oman, given the Omani-IMO efforts described above—that Iran will continue to attack international shipping if they do not cooperate with Iran. Iran used a similar strategy during the recent US-Iran War. Iran launched hundreds of drones and missiles at Gulf states during the war in order to try to influence their decision-making to achieve Iranian objectives, which included halting US operations against Iran and driving a wedge between the United States and its Gulf allies. Iran is currently trying to diplomatically induce and militarily compel these states into cooperation. Iranian Foreign Affairs Minister Abbas Araghchi held a phone call with Omani Foreign Minister Badr al Busaidi on June 25, likely as part of this broader diplomatic effort.[10] The US-Iran memorandum of understanding (MoU) requires Iran to coordinate with Oman and the other Gulf countries on the future management of the strait, which likely explains Iran’s efforts to do so in recent days.[11] Iran has also offered economic incentives to attract regional support for its plans for the strait. Iranian officials told the *Wall Street Journal* that Iran wants Gulf states to participate in a future system that would charge vessels for services in the strait and share the revenue.[12] Officials familiar with the proposal estimated that such fees could generate roughly 40 billion USD annually “for [the] states involved.”[13] It is not immediately clear whether this means 40 billion USD annually split between the states involved, or 40 billion USD annually per state.

The Gulf states appear to be resisting Iran’s efforts to control the strait and impose fees on maritime traffic, however. Delegations from the Gulf Cooperation Council (GCC), which includes Oman, Kuwait, Qatar, Saudi Arabia, Bahrain, and the United Arab Emirates, met with a US delegation led by Secretary of State Marco Rubio in Manama, Bahrain, on June 25 to discuss the US-Iran MoU and maritime security in

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US-Iran Negotiations

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Maritime Activity in the Strait of Hormuz and Persian Gulf

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US and Israeli Air Campaign

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Iranian Domestic Affairs

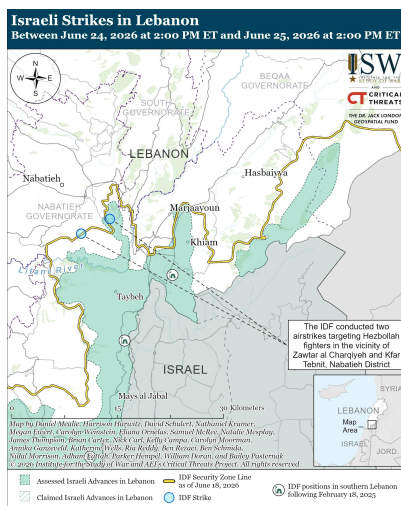
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Other Axis of Resistance Activity

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Endnotes

[1] https://x.com/UK_MTO/status/2070160682264269241

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Iran Update Special Report, June 26, 2026



Ben Rezaei, Bailey Pasternak, Katherine Wells, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Iran is using force in an attempt to maintain its control over the Strait of Hormuz in the immediate future. Iran is likely attempting to prevent vessels from using non-Iranian shipping channels with force in the immediate term as it continues negotiations with the Gulf Arab states to secure long-term recognition of its control.
2. US Central Command (CENTCOM) struck an unspecified number of Iranian missile and drone storage sites and coastal radar sites on June 26 in response to Iran's drone attack on the M/V Ever Lovely.
3. Iran is also using diplomacy and threats to secure long-term diplomatic recognition of its control of the Strait of Hormuz because continued Iranian strikes in the Strait of Hormuz would be difficult to maintain.
4. Iranian officials and state media are reacting to their faltering diplomatic efforts with a significantly more hostile tone towards the Gulf states.
5. Israel and Lebanon signed a US-brokered "framework agreement" on June 26 that describes a path towards eventual full Israeli withdrawal. The agreement stipulates that the Lebanese Armed Forces will backfill the Israel Defense Forces at two positions in southern Lebanon.

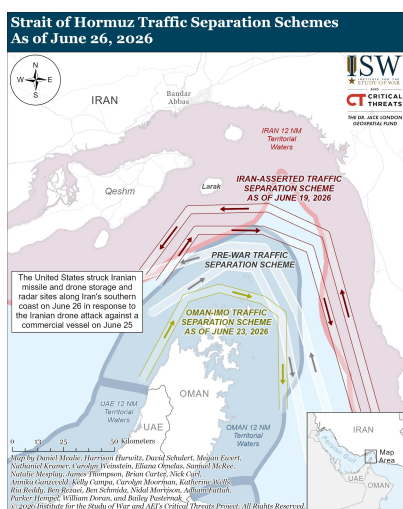
Toplines

Iran is using force in an attempt to maintain its control over the Strait of Hormuz in the immediate future. Iran fired four drones into the strait over the past 24 hours, according to US President Donald Trump.[1] Trump subsequently called this attack a ceasefire violation.[2] An Iranian drone targeted a Singapore-flagged cargo ship approximately eight nautical miles southeast of Dahit, Oman, in the Strait of Hormuz on June 25.[3] The IRGC Navy issued a public warning that demanded vessels coordinate with Iranian authorities and use the Iranian-approved traffic separation scheme some time before it attacked the ship.[4]

Iran is likely attempting to prevent vessels from using non-Iranian shipping channels with force in the immediate term as it continues negotiations with the Gulf Arab states to secure long-term recognition of its control. Oman and the International Maritime Organization (IMO) announced on June 23 that they have established a joint mechanism to help hundreds of vessels move through a designated safe route along the Omani coast. US Central Command (CENTCOM) said on June 26 that it is providing “safe passage coordination” in the strait as well, though it did not specify whether “safe passage coordination” by CENTCOM is related to the IMO-Omani scheme. Iran responded with the attacks outlined above and claimed that the safe route was “completely dangerous.” This claim is an implicit threat that Iran will attack shipping using the safe route because Iran is the only threat to shipping in the strait. Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi explicitly stated on June 26 that safe passage through the strait cannot rely on “parallel routes” or decision-making outside Iran’s considerations as a coastal state.[5] Iran is standing firm on its requirement to approve vessels’ passage through the strait, as it provides Iran with significant leverage that it could exploit at will.

CENTCOM struck an unspecified number of Iranian missile and drone storage sites and coastal radar sites on June 26 in response to Iran’s June 25 drone attack on a commercial vessel.[6] CENTCOM added that US forces will continue to provide “safe passage coordination” and support to commercial vessels transiting the strait.[7]

Iran is also using diplomacy and threats to secure long-term diplomatic recognition of its control of the Strait of Hormuz because continued Iranian strikes in the Strait of Hormuz would be difficult to maintain. Iran needs Gulf states’ recognition of its control over Iran’s route to maintain control over the strait because it cannot conduct attacks in perpetuity without risking instability and additional attacks. Iran has met with various Gulf states in recent days as part of this effort. An Iranian negotiating team member claimed on Iranian TV that Oman and Iran had formed a committee to address the strait issue. But Iran’s diplomatic efforts nonetheless appear to be faltering. Oman and the IMO are also collaborating to undermine Iran’s unrecognized transit scheme, as described above. The Gulf states and international organizations appear united against Iranian efforts to control the strait, however. The United States and the Gulf Cooperation Council ministers emphasized in a joint statement on June 25 that free, unconditional, and unrestricted navigation through the strait remains essential to regional and global security, and explicitly rejected any tolls, fees, or attempts to assert control over the strait.[8]



Iranian officials and state media are reacting to their faltering diplomatic efforts with a significantly more hostile tone towards the Gulf states. Iranian officials attempted on June 24 to frame Iran’s post-war approach to the strait’s management as part of a new regional security framework

that would remove non-littoral Persian Gulf states from decision making over the strait, which would ultimately be in the Gulf states' interests.[9] Iranian officials and entities have since become much more aggressive in response to increased opposition from the Gulf states to Iranian efforts to control the strait. The Iranian Foreign Affairs Ministry called the US-Gulf Cooperation Council (GCC) statement "interventionist, irresponsible, and provocative" and warned against continued US-backed "belligerent and interventionist" behavior in the region.[10] The ministry asserted that Iran and Oman have rights and responsibilities over safe passage through the waterway.[11] Other officials, including two advisers to the supreme leader, also harshly condemned the US-GCC statement.[12] One of the advisers called the Gulf states "peripheral minor players" who have "no seat at the table" and can only survive thanks to Iranian tolerance.[13] The Gulf states have a seat at the table in the memorandum of understanding to discuss control of the strait with Iran, notably. Iranian Parliament National Security and Foreign Policy Committee Chairman Ebrahim Azizi warned the GCC on June 26 that "outsourcing your security has made you less secure" and claimed that US military bases in the region have become a source of threats rather than security.[14]

Israel and Lebanon signed a US-brokered "framework agreement" on June 26 that describes a path towards eventual full Israeli withdrawal.[15] The Lebanese Armed Forces (LAF) will backfill the Israel Defense Forces (IDF) at two positions in southern Lebanon.[16] The IDF will eventually withdraw under the agreement if it is fully actualized. The full details of the plan remain unclear. Israeli Prime Minister Benjamin Netanyahu said that the IDF will remain in its security zone in southern Lebanon.[17] An Israeli source also told Axios that the IDF would remain in southern Lebanon until Hezbollah is disarmed.[18] Israeli Prime Minister Benjamin Netanyahu stated that the IDF and the LAF will start their first "pilot zone" in two unnamed "connected villages" in southern Lebanon.[19] Israeli and US officials also told Axios that US military officers will help oversee LAF forces backfilling these positions to provide training and to confirm that Hezbollah has been removed from the area.[20] Lebanese Ambassador to the United States Nada Maawad Hamad stated that the "framework agreement" with Israel is the "first step toward restoring Lebanon's sovereignty." [21]

Iranian and Hezbollah officials' response to the signing of the agreement has remained limited at the time of this writing. Both the Iranian and Hezbollah leadership have emphasized the need for Israel's withdrawal to be unconditional, however.[22] Hezbollah Parliamentarian Hassan Fadlallah condemned the signing of the "framework agreement" and warned that the Lebanese government cannot implement the agreement "unless they resort to a civil war." [23] Fadlallah also noted that the "framework agreement" represents an intentional obstruction of the US-Iran MoU.[24]

US-Iran Negotiations

Nothing significant to report.

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

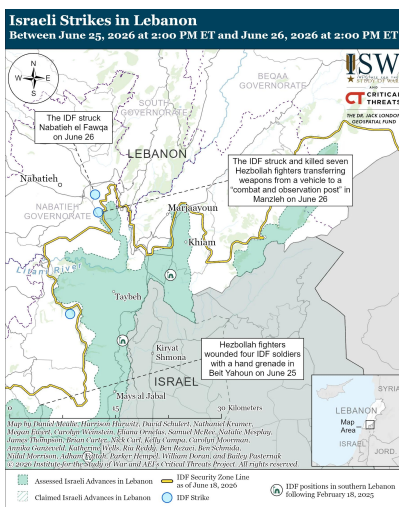
Iran's Axis of Resistance

Nothing significant to report.

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) and Hezbollah continued to engage each other on June 25 and June 26 in southern Lebanon. Israeli media reported that Hezbollah fighters threw a hand grenade at IDF forces operating near Beit Yahoun, South Governorate, injuring four soldiers on June 25.[25] The IDF struck Hezbollah positions in the area with artillery fire in response.[26] The IDF reported that it later conducted two airstrikes targeting Hezbollah fighters in Nabatieh al Fawqa on June 26.[27] The IDF reported that it killed seven Hezbollah fighters who were transporting weapons from a vehicle to a combat and observation post in the second strike on Nabatieh al Fawqa.[28]

The IDF separately reported on June 26 that its forces took “complete control” of Ali al Taher, Nabatieh Governate, which reportedly hosts one of Hezbollah’s largest underground command and control facilities.[29] IDF Arabic-language Media Spokesperson Lieutenant Colonel Ella Waweya stated that Ali al Taher “no longer serves as a base [for Hezbollah] to threaten Israel’s security.”^[30] Hezbollah disputed the IDF’s control of Ali al Taher and stated that the area “is free of any presence of [Israeli] forces.”^[31] The IDF previously struck Hezbollah positions near Ali al Taher once on June 23, and twice on June 24.[32]



Other Axis of Resistance Activity

Nothing significant to report.



Endnotes

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Iran Update Special Report, June 27, 2026



William Doran, Adham Fattah, Benjamin Schmida, 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 cover events from the past 24-hour period.

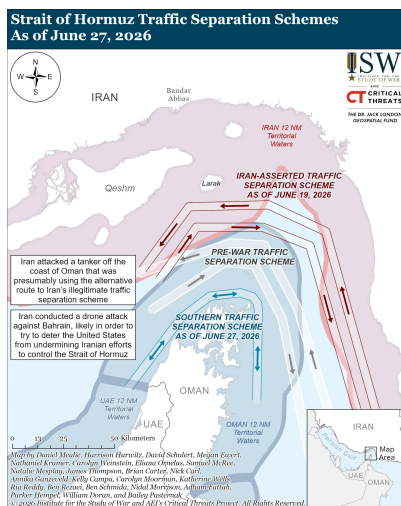
Key Takeaways

1. Iran has continued to use force to try to deter the United States from undermining Iranian efforts to control the Strait of Hormuz. Iranian forces then conducted a drone attack against US positions in Bahrain on June 27. United Kingdom Maritime Trade Operations (UKMTO) subsequently reported on June 27 that an unspecified projectile struck a tanker off the coast of Oman.
2. Iran's strikes against Bahrain may be part of an ongoing Iranian effort to coerce the Gulf states to accept Iran's control of the strait and deter them from supporting US efforts to undermine Iran's control. The Iranian Foreign Affairs Ministry responded to the US retaliatory strikes against Iran on June 26 by warning Gulf states not to allow the United States to attack Iran from bases within their territory.
3. The Israel-Lebanon-United States Trilateral Framework challenges Iranian and Hezbollah efforts to facilitate an Israeli capitulation in Lebanon and threatens Hezbollah's existence as an armed group. The agreement seeks to disarm all non-state armed groups in Lebanon, particularly Hezbollah.
4. Hezbollah is conducting an information operation to weaken the Lebanese government's resolve to disarm Hezbollah by threatening renewed civil war in Lebanon if the government attempts to implement the framework agreement. Hezbollah has long leveraged the threat of renewed civil war to deter the Lebanese government from attempting to disarm the group.
5. The Iranian regime likely views the framework agreement as contravening the Lebanon-related clause of the US-Iran memorandum of understanding (MoU) and may attempt to use the agreement as a pretext to further delay nuclear negotiations with the United States. ISW-CTP has repeatedly assessed that Iran has attempted to condition US-Iran nuclear negotiations on the United States compelling Israel to halt operations against Hezbollah in Lebanon and withdraw from Lebanese territory as part of its efforts to preserve Hezbollah and delay nuclear negotiations.

Toplines

Iran has continued to use force to try to deter the United States from undermining Iranian

efforts to control the Strait of Hormuz. Iran conducted a drone attack targeting a Singapore-flagged cargo ship approximately eight nautical miles southeast of Dahit, Oman, on June 25.[1] A US official told the *New York Times* on June 26 that US forces struck four Iranian missile and drone storage facilities along the strait and on Qeshm Island in response.[2] Iranian forces then conducted a drone attack against US positions in Bahrain on June 27.[3] Bahraini air defenses intercepted one drone, while a second drone landed in a remote area.[4] United Kingdom Maritime Trade Operations (UKMTO) subsequently reported on June 27 that an unspecified projectile struck a tanker off the coast of Oman.[5] Iran likely attacked the vessel because it was presumably using the southern route along Oman’s coast to transit through the strait instead of Iran’s illegitimate traffic separation scheme (TSS).[6] The international community has recently attempted to circumvent Iran’s TSS, undermining Iranian efforts to establish control over the strait. The International Maritime Organization (IMO) and Oman announced a joint effort on June 23 to move hundreds of stranded vessels through the strait through a designated safe route along the Omani coast.[7] The IMO paused this effort on June 26 after Iran attacked the Singapore-flagged cargo ship on June 25, however.[8] The Joint Maritime Information Center (JMIC), which operates under the US-led Combined Maritime Forces, told UKMTO on June 27 that the southern route in the Strait of Hormuz has been expanded to accommodate simultaneous inbound and outbound traffic.[9] It is unclear whether the southern route described by the JMIC is distinct from the IMO-Omani route.



Iran’s strikes against Bahrain may also be part of an ongoing Iranian effort to coerce the Gulf states to accept Iran’s control of the strait and deter them from supporting US efforts to undermine Iran’s control. The Iranian Foreign Affairs Ministry responded to the US retaliatory strikes against Iran on June 26 by warning Gulf states not to allow the United States to attack Iran from bases within their territory.[10] Iran’s attack against Bahrain comes after the Gulf Cooperation Council (GCC) and the United States explicitly rejected on June 25 any Iranian attempts to assert control over the strait, including by charging tolls.[11] The Iranian Foreign Affairs Ministry called the US-GCC statement “interventionist, irresponsible, and provocative.”[12] Iran’s attack on Bahrain may have been, in part, intended to signal to the Gulf states that Iran could take military action against them if they support US efforts to undermine Iranian attempts to control the strait. Multiple Gulf states condemned Iran’s drone attack against Bahrain.[13]

The Israel-Lebanon-United States Trilateral Framework challenges Iranian and Hezbollah efforts to facilitate an Israeli capitulation in Lebanon and threatens Hezbollah’s existence as an armed group. The US State Department released the full text of the framework agreement on June 26.[14] The agreement seeks the disarmament of all non-state armed groups in Lebanon, particularly Hezbollah.[15] The second and third clauses of the agreement confirm that the Lebanese Armed Forces (LAF) will “gradually” reassert control over all of southern Lebanon and that the Israel Defense Forces

against the framework agreement in the Beirut area on June 26 and 27 in line with Fadlallah’s threat that the group would mobilize the Lebanese “street” to stop the government from implementing the agreement.[32] Hezbollah has long leveraged the threat of renewed civil war to deter the Lebanese government from attempting to disarm the group. Hezbollah Secretary General Naim Qassem threatened in August 2025 to organize mass anti-government protests and said that there would be “no life” in Lebanon if the LAF attempted to disarm Hezbollah, for example.[33] Other Hezbollah figures have attempted to delegitimize the framework agreement by deeming it unlawful and spreading disinformation about the agreement’s provisions. Hezbollah parliamentary bloc leader Mohammad Raad alleged that the tripartite agreement is a “cover up” for a permanent Israeli military presence in Lebanon, despite Israel’s affirmation in the agreement that it has no territorial ambitions in Lebanon.[34] Various Hezbollah officials, including Qassem, called the framework agreement unconstitutional and a violation of the sensitive, sectarian National Pact, which suggests that Hezbollah is trying to depict the agreement as both illegal and liable to inflame sectarian tensions.[35]

The Iranian regime likely views the framework agreement as contravening the Lebanon-related clause of the US-Iran MoU and may attempt to use the agreement as a pretext to further delay nuclear negotiations with the United States. Iranian state media claimed that the framework agreement is illegitimate because it exists separately from the MoU and US-Iran negotiations and preserves the IDF’s freedom of movement in Lebanon.[36] The Iranian Foreign Affairs Ministry issued a statement on June 27 that characterized continued Israeli military action in Lebanon as a violation of the first clause of the MoU, which stipulates the “immediate and permanent termination of military operations on all fronts, including in Lebanon.”[37] The Iranian regime likely views the framework agreement, which permits Israel’s continued ground presence until Hezbollah is completely disarmed and enables Israel to act against Hezbollah in self-defense, as contravening the first clause of the MoU.[38] Fadlallah claimed on June 26 that Iran would not sign any agreement with the United States until Israel withdraws from Lebanese territory entirely.[39] ISW-CTP has repeatedly assessed that Iran has attempted to condition US-Iran nuclear negotiations on the United States compelling Israel to halt operations against Hezbollah in Lebanon and withdraw from Lebanese territory as part of its efforts to preserve Hezbollah and delay nuclear negotiations.[40]

US-Iran Negotiations

Nothing significant to report.

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

The Iranian-backed Popular Mobilization Forces (PMF) appointed Haqqi Ismail al Khalidi as the PMF Anbar Operations Command commander on June 24.^[41] The PMF is an Iraqi state security service that includes multiple Iranian-backed Iraqi militias that answer to Iran instead of the prime minister.^[42] Khalidi replaced Haider al Hammouri, who temporarily held the position after US-Israeli combined force strikes killed former PMF Anbar Operations Command Commander Dawai al Baiji in March 2026.^[43] The PMF has also characterized Kataib Hezbollah-affiliated Qasim Musleh al Khafaji as the PMF Anbar Operations Command commander.^[44] It is unclear how Khafaji and Khalidi's responsibilities differ.

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