

Iran Update Special Report, June 28, 2026



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Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Iran has continued to attack US forces in the region to try to deter the United States from undermining Iranian efforts to control the Strait of Hormuz. An Iranian drone struck the Panama-flagged M/T Kiku on June 27. US military aircraft targeted Iranian military surveillance infrastructure, communications systems, air defense sites, drone storage facilities, and mine-laying capabilities in response. The IRGC launched drone and ballistic missile attacks targeting the US Fifth Fleet Naval Base in Bahrain and the Ali Al Salem Airbase in Kuwait on June 28.
2. Iran's strikes may reflect an Iranian effort to dissuade the Gulf states from resisting Iranian control over the strait. Iran may have intended for its strikes to signal to Gulf states that Iran will respond with force to any Gulf opposition to its control of the strait, amid recent Gulf resistance to this Iranian effort. Iranian media and officials have adopted a harsher tone toward Gulf countries in recent days, likely in response to these countries' opposition to Iranian management of the strait.
3. Iran is threatening to suspend negotiations as part of its efforts to deter the United States from challenging Iranian sovereignty over the strait. The IRGC Navy stated on June 27 that US strikes on Iran violated the ceasefire and "will result in the complete halt of all diplomatic processes."
4. The Israeli government confirmed the locations of two "pilot zones" where the Lebanese Armed Forces (LAF) will backfill the Israel Defense Forces (IDF) in southern Lebanon as part of the June 26 trilateral framework agreement. Both of the announced pilot zones lie beyond the IDF's "anti-tank line," which would likely reduce the risk of Hezbollah launching attacks on Israeli territory from those zones following the IDF's withdrawal.

Toplines

Iran has continued to attack US forces in the region to try to deter the United States from undermining Iranian efforts to control the Strait of Hormuz. An Iranian drone struck the Panama-flagged M/T *Kiku* on June 27.[1] US military aircraft targeted Iranian military surveillance infrastructure,

communications systems, air defense sites, drone storage facilities, and mine-laying capabilities in response.[2] The Islamic Revolutionary Guards Corps (IRGC) Navy then released a statement that threatened US bases in the region.[3] The IRGC launched drone and ballistic missile attacks targeting the US Fifth Fleet Naval Base in Bahrain and the Ali Al Salem Airbase in Kuwait on June 28.[4] Bahraini air defenses intercepted several projectiles, but the Iranian attack destroyed a residential building, according to Bahrain's Interior Ministry.[5] These strikes are likely intended to deter the United States from continuing to undermine Iranian efforts to control the strait by signaling to the United States that Iran will attack US forces in response to US strikes on Iran that seek to reduce Iran's ability to threaten international shipping. Iranian officials have continued to emphasize after the recent exchange of fire that Iran intends to assert sovereignty over the strait. Iranian Foreign Affairs Minister Abbas Araghchi stated on June 28 that Iran is "solely responsible" for managing the Strait of Hormuz under the US-Iran memorandum of understanding (MoU).[6] The fifth article of the MoU explicitly states that Iran must engage in dialogue with Oman and the Persian Gulf littoral states to determine the "future administration" of the strait.[7] Iranian Artesh Spokesperson Mohammad Akraminia separately stated on June 28 that Iran seeks to use control of the strait to strengthen its regional power, not just to collect tolls.[8] ISW-CTP has previously assessed that Iran is prioritizing securing recognized control over the strait over collecting tolls.[9]

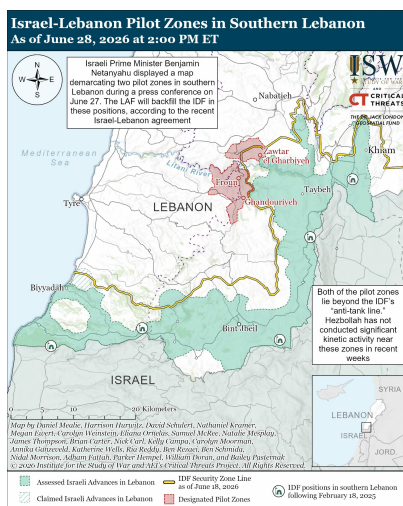


Iran's strikes may also reflect an Iranian effort to dissuade the Gulf states from resisting Iranian control over the strait. Iran may have intended for its strikes to signal to Gulf states that Iran will respond with force to any Gulf opposition to its control of the strait, amid recent Gulf resistance to Iranian management of the waterway. 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.[10] Omani officials told CNN on June 28 that Oman opposes any mandatory fees or tolls in the Strait of Hormuz, citing international freedom of navigation.[11] Iranian media and officials have adopted a harsher tone toward Gulf countries in recent days, likely in response to these countries' opposition to Iranian management of the strait. Iran's English-language media outlet published an article on June 26 in which it criticized the Gulf states and claimed that these countries are attempting to "conceal" the reality that Iran has established a new "regional balance" with its control over the strait, for example.[12]

Iran is also threatening to suspend negotiations as part of its efforts to deter the United States from challenging Iranian sovereignty over the strait. The IRGC Navy stated on June 27 that US strikes on Iran violated the ceasefire and "will result in the complete halt of all diplomatic processes." [13] Iran may calculate that threatening to stop negotiations could alter US decision-making, given that US officials have repeatedly stated that they seek to resolve key nuclear issues with Iran. Iran previously suspended negotiations with the United States prior to the signing of the MoU in order to try to

compel the United States to pressure Israel to halt operations against Hezbollah.[14]

The Israeli government confirmed the locations of two “pilot zones” where the Lebanese Armed Forces (LAF) will backfill the Israel Defense Forces (IDF) in southern Lebanon as part of the June 26 trilateral framework agreement.[15] Israeli Prime Minister Benjamin Netanyahu displayed a map of two zones located on opposite banks of the Litani River during a press conference on June 27.[16] The northern pilot zone includes territory surrounding Zawtar el Gharbiyeh, Nabatieh District, and the southern pilot zone includes territory surrounding Ghandouriyeh and Froun, Bint Jbeil District. The June 26 framework agreement’s second and third clauses require the LAF to assume responsibility for security in pilot zones after it disarms and dismantles armed groups in those areas.[17] Both of the announced pilot zones lie beyond the IDF’s “anti-tank line,” which would likely reduce the risk of Hezbollah launching attacks on Israeli territory from those zones following the IDF’s withdrawal.[18] Hezbollah has also not conducted major attacks in Froun, Ghandouriyeh, or Zawtar el Gharbiyeh in recent weeks and has instead concentrated operations east of Nabatieh City.[19] An Israeli military correspondent reported on June 27 that the IDF will retain its positions on advantageous terrain surrounding Ali al Taher, Beaufort Castle, and Kfar Tebnit, which the IDF deems necessary for preventing Hezbollah anti-tank guided missile (ATGM) attacks on northern Israel.[20]



Hezbollah has continued to threaten civil war in Lebanon if the Lebanese government attempts to implement the framework agreement as part of an information operation to weaken the government’s resolve to disarm Hezbollah. Hezbollah Parliamentarian Hassan Fadlallah warned on June 28 that disillusionment with the Lebanese government would drive civilians to arm and train with Hezbollah and accused the government of inciting civil war.[21] Fadlallah said that Hezbollah’s “fingers will remain on the trigger” and that the group possesses the “internal strength” to counter all “conspiracies,” likely referring to the government’s intention to disarm Hezbollah.[22] An unspecified Hezbollah source separately told Israeli media on June 28 that the agreement will lead to civil war in Lebanon.[23] These statements are consistent with Hezbollah’s recent and long-term efforts to leverage the threat of civil war to deter the LAF from disarming the group.[24] Hezbollah Secretary General Naim Qassem threatened in August 2025 to organize anti-government protests and said that there would be “no life” in Lebanon if the LAF attempted to disarm Hezbollah, for example.[25]

Hezbollah and the Iranian regime continue to assert that the framework agreement violates the Lebanon provision of the US-Iran MoU. Iran may use this claim to further delay nuclear talks with the United States. Fadlallah claimed on June 28 that the framework agreement’s true purpose is to undermine the MoU and warned that Iran will not sign any agreement with the United States without a guaranteed Israeli withdrawal from Lebanon.[26] Iranian officials and state media

portrayed the agreement as a violation of Lebanese sovereignty and continued to demand a full IDF withdrawal from Lebanon as part of the MoU.[27] ISW-CTP continues to assess that Iran is attempting 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.[28]

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

Hezbollah fighters killed an Israeli officer in Deir Seryan, Marjaayoun District, on June 28 amid continued Israeli strikes on Hezbollah targets in southern Lebanon.[29] The IDF said that Hezbollah fighters killed an IDF officer and wounded a soldier during a small arms engagement in Deir Seryan.[30] The IDF said that its forces later killed the Hezbollah fighters responsible for the attack.[31] The IDF also struck likely Hezbollah targets in Deir Seryan, Baraachit, Froun, and Nabatieh el Fawqa on June 27 and 28, according to Lebanese media.[32] The IDF separately published footage of June 27 of airstrikes that targeted rocket launchers and Hezbollah fighters armed with rocket-propelled grenades (RPG) in Nabatieh City on June 28.[33]

Other Axis of Resistance Activity

Iraqi media reported on June 28 that unspecified Iraqi political parties with Iranian-backed Iraqi militia wings plan to publicly announce their separation from their affiliated militias in response to US pressure on the Iraqi federal government to reduce Iranian influence in Iraq.[34] This disengagement, however, is reportedly part of an effort by Iranian-backed parties to further entrench themselves in Iraqi state institutions.[35] Multiple sources, including Shia sources and a source close to the Shia Coordination Framework, told Iraqi media that political parties with armed wings are preparing to publicly announce the “removal of military uniforms,” which

appears to refer to the separation of armed groups from their affiliated political parties, as part of a plan to “covertly take [over]” Iraqi state institutions.[36] Iraqi media estimated that around 3,000 senior civil servant positions could be redistributed to these political parties after their separation from armed groups.[37] Unspecified sources claimed that the United States’ opposition to militia-linked figures filling positions in the Iraqi federal government would be irrelevant if political parties disengage from their armed wings.[38] The United States has repeatedly opposed militia-affiliated individuals occupying high-level Iraqi federal government positions, even if they are affiliated with a militia that has been disarmed.[39] ISW-CTP has previously assessed that Iranian-backed Iraqi militias Asaib Ahl al Haq and Kataib al Imam Ali, which both have political wings in the Shia Coordination Framework, may have signaled willingness to disarm to reduce US opposition to their participation in the Iraqi government.[40] It is also possible that these militias seek to receive some of the 35,000 jobs in Iraqi security institutions that Iraqi Prime Minister Ali al Zaydi has reportedly proposed to be allocated to militia members who disarm.[41]

Shia sources added to Iraqi media that Iraqi political parties with militia wings devised this plan following Zaydi’s meeting with US Special Envoy to Iraq and Syria Tom Barrack in mid-June, during which Barrack pressured Zaydi to implement several reforms related to reducing Iranian influence in Iraq.[42] A Shia source told Iraqi media on June 28 that Barrack presented Zaydi with a plan for “investment in exchange for arms.”[43] The United States would support US investment in Iraq in exchange for Zaydi’s government limiting Iranian influence in Iraq by disarming the militias, dismantling corrupt financial networks, and removing militia-aligned figures from senior-level government positions.[44] Regional media similarly suggested on June 17 that the United States is conditioning economic support for the Iraqi government on the government meeting the United States’ demands.[45] The Iraqi federal government has taken initial steps to strengthen its anti-money laundering and counter-terrorist financing measures following Barrack’s visit, including by replacing the Central Bank of Iraq governor with the head of the bank’s anti-money laundering and counter-terrorist financing reform office.[46] Zaydi’s government also began a large crackdown on corruption on June 27 in which Iraqi authorities have already arrested over 45 people throughout Iraq, particularly in Baghdad.[47] A Shia parliamentarian claimed on June 28 that most people who have been arrested are either Sunni or members of former Prime Minister Mohammad Shia al Sudani’s parliamentary coalition but denied that the campaign is a political attack.[48]

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Endnotes

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[2] <https://x.com/CENTCOM/status/2070987021930102919>

[3] <https://t.me/farsna/445249>

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Key Takeaways

1. Iran and the United States will reportedly hold talks in Doha, Qatar, on June 30 to discuss the implementation of the US-Iran memorandum of understanding (MoU) despite the recent exchange of fire between the United States and Iran. Iran will likely use these talks to try to secure the implementation of provisions in the MoU that help advance Iranian objectives, including the provision about the release of Iranian frozen assets.
2. Clerics within Iran's Assembly of Experts, including within the body's leadership, appear divided over how the regime should implement the US-Iran MoU and how much latitude Iranian negotiators should have in talks with the United States. The Assembly of Experts is an 88-member clerical body that is responsible for appointing and supervising the Supreme Leader, according to the Iranian constitution.
3. Iranian President Masoud Pezeshkian separately appears to be trying to build support for the MoU among senior clerics and defend the Iranian negotiating team. Pezeshkian met with several senior Shia clerics in Qom Province on June 28, likely to rally clerical support for the agreement, present the MoU as a source of economic relief, and insulate negotiators from criticism by hardline clerics.
4. Iranian officials and media are signaling that Iran will not allow Oman to constrain Iran's effort to establish control over the Strait of Hormuz. IRGC-affiliated Tasnim News Agency argued in an op-ed on June 29 that tying the future management of the strait to Omani consent would harm Iranian interests.
5. An international media correspondent released on June 29 the reported text of the June 26 Israel-Lebanon-United States trilateral framework agreement's security annex, which stipulates the process by which the Lebanese Armed Forces (LAF) will backfill the Israel Defense Forces (IDF) in southern Lebanon. The annex includes a four-stage mechanism for the LAF and IDF to dismantle non-state armed groups in designated "pilot zones" in southern Lebanon.
6. Hezbollah officials and media are attempting to delegitimize the trilateral framework agreement by accusing the Lebanese government of violating Lebanese law and public interests. Hezbollah-affiliated media argued on June 29 that the agreement is invalid because it allegedly violates

Lebanese sovereignty, popular consent, and the Lebanese constitution due to the agreement being signed under Israeli military “duress.”

Toplines

Iran and the United States will reportedly hold talks in Doha, Qatar, on June 30 to discuss the implementation of the US-Iran memorandum of understanding (MoU) despite the recent exchange of fire between the United States and Iran. Iran will likely use these talks to try to secure the implementation of provisions in the MoU that help advance Iranian objectives, including the provision about the release of Iranian frozen assets. US President Donald Trump announced on June 29 that Iran requested talks in Doha on June 30.[1] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi stated on June 29, prior to Trump’s announcement, that no technical talks are currently planned for this week, however.[2] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei later stated after Trump’s announcement that Iran’s current priority is to ensure the implementation of the MoU.[3] Baghaei added that Iran will send a delegation to Doha this week to follow up on the implementation of the MoU, including clause 11, which focuses on the release of Iranian frozen assets. Baghaei denied that Iran will hold any negotiations on a final deal with the United States at any level in the coming days, however.[4] Baghaei claimed that the Iranian delegation’s visit to Doha has “nothing to do with” US officials’ trip to Qatar.[5] Baghaei’s remarks suggest that Iran continues to insist on the United States releasing Iran’s frozen assets before Iran agrees to discuss nuclear issues. Early access to frozen funds would give Iran immediate economic relief, reduce US leverage in nuclear talks, and provide Iran with funds that it could use to reconstitute its military capabilities and the Axis of Resistance.[6]

Clerics within Iran’s Assembly of Experts, including within the body’s leadership, appear divided over how the regime should implement the US-Iran MoU and how much latitude Iranian negotiators should have in talks with the United States. The Assembly of Experts is an 88-member clerical body that is responsible for appointing and supervising the Supreme Leader, according to the Iranian constitution.[7] Sixty Assembly members issued a 10-point statement on June 28 in which they warned negotiators not to violate Supreme Leader Mojtaba Khamenei’s red lines.[8] These red lines include solidifying Iranian control over the Strait of Hormuz, securing compensation and the release of Iranian frozen assets, securing sanctions relief, and forcing US troops to withdraw from the region.[9] Mojtaba outlined these Iranian objectives in a statement on June 18.[10] The Assembly of Experts statement also reiterated that Mojtaba barred negotiators from discussing Iran’s nuclear program with the United States.[11] The statement notably did not receive unanimous support within the Assembly, even among its Board of Directors, which is highly unusual given the body’s seniority and its tendency to present a unified public posture on issues. The Assembly of Experts Secretariat later issued a statement on June 28 clarifying that the statement did not represent the Assembly’s official position and that official Assembly statements are only released by the Secretariat, the chairman, or the presidium.[12] The Secretariat added that the Assembly of Experts members who did not sign the statement either opposed the statement or were not informed about it. The chart below displays which Assembly of Experts leaders signed the original statement and which ones did not.

Divisions in the Assembly of Experts over Iran's Approach to Negotiations with the United States

Three of the seven board of directors members signed the statement criticizing Iran's approach to negotiations

Leadership Position	Names	Signed Statement
Chairman	• Mohammad Ali Movahedi Kermani	No
First Vice Chairman	• Hashem Hosseini Bushehri	No
Second Vice Chairman	• Alireza Arabi	Yes
First Secretary	• Abbas Kaabi	No
Second Secretary	• Mohsen Araki	Yes
Administrative & Financial Officer	• Mahsen Qomi	No
Cultural Officer	• Mahmoud Rajabi	Yes

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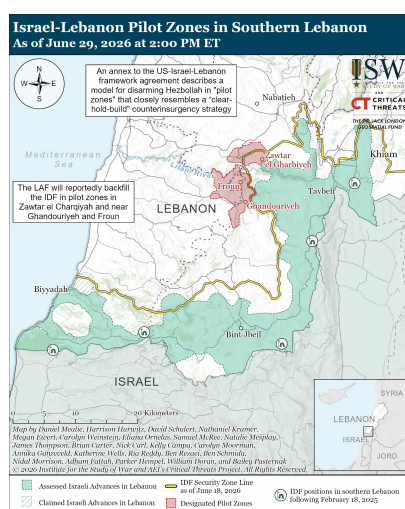
It remains unclear who pushed the group of Assembly members to issue the statement outside the Assembly's normal process. This incident is at least the second incident in recent months that has publicly revealed divisions within the Assembly of Experts. Mojtaba's selection as Supreme Leader previously divided the Assembly's members, according to anti-regime and Western media. Anti-regime media reported in March that Islamic Revolutionary Guards Corps (IRGC) commanders heavily pressured Assembly of Experts members to appoint Mojtaba as Supreme Leader, but that some Assembly members refused to attend the vote in protest.[13] The *New York Times* similarly reported in March that IRGC Commander Major General Ahmad Vahidi and former IRGC Commander Major General Mohammad Ali Jafari pushed the Assembly of Experts to select Mojtaba as Supreme Leader after Ali Khamenei's death.[14]

Iranian President Masoud Pezeshkian separately appears to be trying to build support for the MoU among senior clerics and defend the Iranian negotiating team. Pezeshkian met with several senior Shia clerics in Qom Province on June 28, likely to rally clerical support for the agreement, present the MoU as a source of economic relief, and insulate negotiators from criticism by hardline clerics.[15] Pezeshkian emphasized that the government expects the MoU to create economic openings, including via sanctions relief and the release of Iranian frozen assets.[16] Pezeshkian told Ayatollah Mousa Shobairi Zanjani that the agreement is a major victory, the United States has lifted oil and petrochemical sanctions, and Qatar will soon release \$6 billion USD of Iran's \$12 billion USD worth of assets currently frozen in Qatar.[17] Pezeshkian's emphasis on economic relief suggests that he is trying to sell the MoU domestically as a tangible victory to ease public pressure and protect Iranian negotiating members from hardline criticisms, such as from members of the Assembly of Experts (see above).

Iranian officials and media are signaling that Iran will not allow Oman to constrain Iran's effort to establish control over the Strait of Hormuz. IRGC-affiliated Tasnim News Agency argued in an op-ed on June 29 that tying the future management of the strait to Omani consent would harm Iranian interests.[18] Tasnim argued that Oman can participate in and benefit from Iran's control over the strait but cannot determine whether Iran manages the waterway.[19] Tasnim added that the strait is an "existential" issue for Iran but only an "economic" issue for Oman and argued that Iran should not let the United Nations Convention on the Law of the Sea (UNCLOS) or Omani opposition return the strait back to its pre-war status.[20] UNCLOS does not permit states bordering international waterways to restrict transit passage or impose charges for transit.[21] Supreme Leader Adviser Ali Akbar Velayati similarly stated on June 29 that Iran has adopted a "new and decisive approach" to organizing traffic, managing traffic costs, and maintaining the strait, and called this issue strategic and non-negotiable.[22] Velayati also warned Oman against letting external pressure, including from the Gulf countries, damage its relationship with Iran.[23] These comments come as the Omani government has signaled its opposition to Iranian control of the strait, including via a joint Gulf Cooperation Council-US statement on June 25 that explicitly rejected any Iranian attempts to exert control over the strait.[24] The International Maritime Organization (IMO) and Oman also 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 but later paused this effort on June 26 after Iran attacked a Singapore-flagged cargo ship on June 25.[25] The IMO-Omani route undermines Iranian efforts to control the strait by offering an alternative route to Iran's illegitimate traffic

separation scheme, which forces vessels into Iranian territorial waters. Omani Foreign Minister Badr al Busaidi additionally stated that Oman does not support transit fees for passage through the strait during an interview with French media on June 29.[26] Omani officials similarly told CNN on June 27 that Oman opposes “mandatory fees or tolls” in the strait.[27] Busaidi did not rule out “mechanisms related to maritime services,” such as “enhancing navigation safety,” and “combating pollution,” however.[28] Iranian media argued that Busaidi’s comment suggested that Oman would be open to charging fees for maritime services.[29] Iran has consistently sought to impose fees on vessels transiting through the strait as part of its effort to solidify control over the waterway.

An international media correspondent released on June 29 the reported text of the June 26 Israel-Lebanon-United States trilateral framework agreement’s security annex, which stipulates the process by which the Lebanese Armed Forces (LAF) will backfill the Israel Defense Forces (IDF) in southern Lebanon.[30] The annex includes a four-stage mechanism for the LAF and IDF to dismantle non-state armed groups in designated “pilot zones” in southern Lebanon.[31] The annex’s model for disarming non-state groups in pilot zones closely resembles a “clear-hold-build” counterinsurgency strategy. The agreement’s security annex stipulates that security forces will take “legal measures” against armed non-state fighters and destroy all non-state groups’ infrastructure and weapons, which an unspecified third party will verify.[32] LAF units will then hold and establish control over the pilot zones, coinciding with IDF units’ phased withdrawal from the zones, to prevent non-state armed groups from reconstituting in those areas.[33] The Lebanese government will finally begin reconstruction efforts in these areas with international assistance and political oversight.[34] The annex also stipulates that Israel and Lebanon will establish a military deconfliction body to verify disarmament progress in southern Lebanon and operate as an indirect backchannel between the IDF and LAF.[35] It is unclear whether the IDF and LAF will share responsibility for initial clearing operations in the pilot zones.[36] The security annex also does not clarify whether Israel and Lebanon will establish additional pilot zones in the future. Israeli Defense Minister Israel Katz told Israeli journalists on June 29 that the IDF will not “retreat a single millimeter” further from Israeli-held territory in southern Lebanon, except for the two current pilot zones, until Hezbollah is disarmed.[37] An unspecified official separately told Israeli media on June 28 that the annex will enable the IDF to retain its “freedom of action” in Lebanon, although the reported text does not clarify whether the IDF may continue to target Hezbollah in areas where the LAF is operating.[38]



Hezbollah officials and media are attempting to delegitimize the trilateral framework agreement by accusing the Lebanese government of violating Lebanese law and public interests. Hezbollah-affiliated media argued on June 29 that the agreement is invalid because it allegedly violates Lebanese sovereignty, popular consent, and the Lebanese constitution due to the

agreement being signed under Israeli military “duress.”[39] Hezbollah officials, including Secretary General Naim Qassem, have made similar statements in recent days, claiming that the agreement and ongoing Lebanese negotiations with Israel constitute acts of “high treason” and violate the constitution, the sensitive sectarian National Pact, and Lebanon’s territorial integrity.[40]

Hezbollah is also likely attempting to mobilize non-Shia elements of the Lebanese public to oppose the framework agreement. Hezbollah-affiliated media published statements from Lebanese Sunni religious leaders that denounced the agreement and expressed support for Hezbollah on June 29.[41] Hezbollah may assess that platforming non-Shia opposition to the framework agreement strengthens the group’s narrative that the Lebanese government is violating the interests of all Lebanese civilians, rather than exclusively Hezbollah’s predominantly Shia support base.[42]

Hezbollah is pursuing multiple lines of effort to oppose the framework agreement and deter the Lebanese government from disarming Hezbollah. Senior Hezbollah officials are conducting an information operation to deter the Lebanese government from disarming Hezbollah by threatening renewed civil war in Lebanon.[43] Hezbollah Parliamentarian Hassan Fadlallah has repeatedly warned that Hezbollah will mobilize mass protests to stop the government from implementing the agreement, for example.[44] Other Hezbollah officials and allies, including Hezbollah Deputy Political Council leader Mahmoud Qamati and Lebanese Parliament Speaker Nabih Berri, have discouraged Hezbollah and Amal Movement supporters from organizing public demonstrations, however.[45] Hezbollah parliamentary bloc leader Mohammad Raad has also attempted to spread disinformation about the agreement’s provisions and alleged on June 27 that the agreement is a “cover up” for a permanent Israeli military presence in Lebanon.[46]

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

The IDF and Hezbollah continued to engage each other on June 28 and 29 in southern Lebanon. The IDF reported that it destroyed a Hezbollah underground tunnel complex under Majdal Zoun, southern Lebanon, on June 28.[47] The IDF reported that the 200-meter-long and 25-meter-deep complex hosted four underground drone launchers and “hundreds” of Hezbollah weapons, including Iranian-produced drones and drone components.[48] Hezbollah fighters previously defended Majdal Zoun against advancing Israeli forces in early June using a variety of weapons, including anti-tank guided missiles (ATGM), improvised explosive devices (IED), mortars, rockets, and rocket-propelled grenades (RPG).[49]

The IDF also reported that it struck three Hezbollah headquarters on June 28 near Maifadoun and Nabatieh in southern Lebanon.[50] The IDF reported on June 29 that an explosion “seriously injured” an Israeli reserve soldier near Arnoun in Nabatieh Governorate, southern Lebanon.[51] The IDF stated that it is investigating the cause of the incident.[52]

US CENTCOM Commander Admiral Brad Cooper met with Lebanese President Joseph Aoun and Lebanese Armed Forces (LAF) Commander General Rodolphe Haykal in Beirut on June 29 to discuss preparations to implement the June 26 trilateral framework agreement.[53] Lebanese media reported that Cooper visited Lebanon to oversee the initial stages of the LAF’s deployment to the two “pilot zones” that Israel and Lebanon agreed on in the framework agreement.[54]

Other Axis of Resistance Activity

Iraqi authorities arrested around 50 people on June 28 as part of an Iraqi federal government anti-corruption campaign that is expected to last at least six months.[55] Iraqi Prime Minister Ali al Zaydi said during a cabinet meeting on June 28 that the arrests were the “first phase” of the Iraqi government’s efforts to recover public funds.[56] An informed source told Iraqi media on June 28 that the current phase of the anti-corruption campaign is expected to last 72 hours.[57] Iraqi authorities, including the Counter Terrorism Service, arrested individuals in multiple areas of Baghdad as well as in Maysan, Babil, Diyala, and Salah al Din provinces and Iraqi Kurdistan.[58] Iraqi authorities closed the Green Zone, which houses the Iraqi parliament, the US Embassy, and several other government buildings, on June 28 to conduct arrests but reopened it on June 29.[59] Iraqi media reported that the arrested individuals include senior officials, political leaders, former and current government agents, company owners who launder funds to political leaders, brokers, and intermediaries.[60] The highest-profile arrested figure was Sunni Azm Alliance head Muthanna al Samarraï.[61] Central Anti-Corruption Criminal Court Judge Diaa Jaafar told Iraqi media that the Iraqi government’s investigation of former Ministry of Oil Undersecretary for Refining Affairs Adnan al Jumaili implicated many parliamentarians whom Iraqi authorities arrested on June 28.[62] Iraqi authorities arrested Jumaili in May 2026 and have seized more than \$74 million USD since his arrest, according to Iraq’s Supreme Judicial Council.[63]

These arrests follow US pressure on the Iraqi federal government to dismantle Iranian-backed Iraqi militia-linked financial networks and combat corruption. The US Government has reportedly conditioned US financial support to Zaydi’s government on Zaydi’s progress in meeting these US demands.[64] The Iraqi federal government has taken initial steps to strengthen its anti-money laundering and counter-terrorist financing measures in recent weeks, including by replacing the Central Bank of Iraq governor with the head of the bank’s anti-money laundering and counter-terrorist financing reform office and establishing a government oversight body.[65] Zaydi may have also facilitated these arrests to demonstrate his political prowess, given his lack of previous government experience before assuming the premiership, or to undermine his political opponents. A Shia parliamentarian and an Iraq

analyst noted on June 28 and 29 that most of the individuals who were arrested are either Sunni or members of former Prime Minister Mohammad Shia al Sudani's coalition.[66]

Iraqi Federal Government Spokesperson Haider al Aboudi announced on June 29 that Zaydi has set September 30 as the final deadline for Iraqi citizens and armed groups to surrender their weapons to Iraqi authorities.[67] Aboudi stated that any weapons not handed over to the state by this deadline will be considered "irregular weapons." [68] Iranian-backed Iraqi militias, such as Harakat Hezbollah al Nujaba, have continuously asserted that the government's efforts to restrict arms to the state do not apply to the militias.[69] Zaydi said on June 24 that "resistance groups," which refers to Iranian-backed Iraqi militias, will not need to remain armed after US-led international coalition forces leave Iraq at the end of September, however.[70] US-led international coalition forces left federal Iraq in January 2026 and are currently based in Iraqi Kurdistan.[71] Zaydi also said in an interview with regional media on June 29 that the Iraqi federal government will announce a "National Sovereignty Conference" by the end of the year to solidify the Iraqi state's exclusive right to use force.[72]

The Iraqi federal government's lack of accurate information on the number and types of weaponry in Iraq will make it difficult to determine the progress of the government's efforts to restrict arms to the state. The Interior Ministry (Mol) announced on April 20 that it had established 864 weapon registration offices across Iraq, and that more than 310,000 firearm registration applications have been submitted.[73] The Mol also announced that the National Arms Bank, which the Iraqi federal government reportedly created to track all government-owned weapons in December 2025, has received over 5.8 million firearms.[74] An unidentified senior Iraqi military official told al Araby al Jadeed on June 29 that the Iraqi federal government has not yet received any "advanced" weaponry, such as drones or long-range missiles, despite a government program to buy medium and heavy weapons from Iraqi citizens and armed groups.[75] Iran has provided its partners in Iraq with drones and missiles for years, which militias used to strike US and foreign targets in Iraq and the region during the recent war.[76] Iraqi media noted that the federal government lacks accurate information on the number, and likely the types, of weapons in the country. It is therefore difficult to determine what proportion of the total number of weapons in Iraq the Mol's numbers represent.[77] The Iranian-backed Popular Mobilization Forces, which includes many Iranian-backed Iraqi militias, operate with limited government oversight, for example.[78] Many Iraqi militias, including Harakat Hezbollah al Nujaba, Kataib Sayyid al Shuhada, and Kataib Hezbollah, have also continuously refused to disarm.[79]

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Iran Update Special Report, June 30, 2026



Ria Reddy, Adham Fattah, Parker Hempel, Bailey Pasternak, 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. Iranian officials are simultaneously employing diplomatic outreach and military coercion to pressure regional states to support a new “regional security mechanism,” likely to advance Iran’s long-standing objective of expelling the United States from the Middle East. Iran is likely using this proposed regional security mechanism to encourage Gulf states to distance themselves from the United States in exchange for cooperation with Iran. Iran may be offering economic cooperation, guarantees against Iranian attacks, and access to the Strait of Hormuz in exchange for Gulf support for key Iranian demands.
2. Iranian officials continue to signal that Iran intends to maintain long-term control over the Strait of Hormuz despite apparent resistance from Gulf states.
3. Iran and Oman appear to have at least some disagreements over the strait’s management, but any arrangement, regardless of fees, that recognizes Iranian control over the strait would be extremely problematic to US and Gulf interests as well as global commerce. An Iranian official and an unspecified regional diplomat told the *New York Times* on June 30 that Oman recently presented the United States with a proposal under which shipping companies would pay service fees to transit through the strait. The regional diplomat stated that the fees would be voluntary, but the Iranian official claimed they would be mandatory, which suggests that Iran and Oman disagree on this issue.
4. Iran announced that it will send a delegation to Doha, Qatar, on July 1 to discuss the implementation of the US-Iran MoU, but Iran continues to reject direct talks with the US delegation in Qatar and any discussion of its nuclear program.
5. US Central Command (CENTCOM) will reportedly deploy ground forces to Israel and Lebanon to monitor compliance with the Trilateral Framework Agreement. CENTCOM’s on-the-ground presence would likely enable the United States to more quickly identify and address potential Israeli or Hezbollah ceasefire violations and thereby limit Iran’s potential advantage in the recently established “deconfliction cell.”

Toplines

Iranian officials are simultaneously employing diplomatic outreach and military coercion to pressure regional states to support a new “regional security mechanism,” likely to advance Iran’s long-standing objective of expelling the United States from the Middle East. Iran has long sought to convince Gulf and other regional states to remove US military forces from their territory by claiming that the presence of US forces in their territory threatens their security.[1] Iran intensified this campaign during and after the recent US-Israel-Iran war. Iranian officials have repeatedly framed regional security as the responsibility of regional states rather than external powers, referring to the United States. Iranian Foreign Affairs Minister Abbas Araghchi emphasized the importance of establishing a regional security framework led by regional countries instead of foreign powers during a meeting with Iraqi National Security Adviser Qassem al Aboudi on June 28.[2] Araghchi also emphasized Iran’s willingness to cooperate with Gulf states to establish such a mechanism.[3] Acting Iranian Defense and Armed Forces Logistics Minister Seyed Majid Ibn al Reza similarly called Gulf security an “endogenous matter” that regional states should manage themselves during a phone call with Qatari Deputy Prime Minister Saoud bin Abdulrahman al Thani on June 30.[4] Iran is likely using this proposed regional security mechanism to encourage Gulf states to distance themselves from the United States in exchange for cooperation with Iran. Iran may be offering economic cooperation, guarantees against Iranian attacks, and access to the Strait of Hormuz in exchange for Gulf support for key Iranian demands, including the removal of US forces from the region and recognition of Iran’s control over the strait. Iran’s use of the strait as a bargaining tool further corroborates ISW-CTP’s ongoing assessment that Iran views control over the Strait of Hormuz as leverage it can use to extract concessions from other states. Iran has reinforced these diplomatic efforts with military threats and attacks on the Gulf states. Iran’s recent strikes against Bahrain and Kuwait may have sought, at least in part, to signal to the Gulf states that Iran may respond with force to Gulf opposition to Iranian control over the strait.[5] Iran also likely conducted these attacks to try to frame the United States as an unreliable security guarantor as part of its broader campaign to drive a wedge between the United States and its Gulf partners.

Iranian officials continue to signal that Iran intends to maintain long-term control over the Strait of Hormuz despite apparent resistance from Gulf states. Iranian officials have repeatedly described the strait as a strategic tool.[6] The US-Iran memorandum of understanding’s (MoU) fifth clause states that Iran will work with Oman to “define the future administration and maritime services in the Strait of Hormuz” in consultation with other Persian Gulf littoral states.[7] Iranian officials have emphasized that Oman and other Gulf states cannot prevent Iran from asserting control over the strait, however.[8] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi stated on June 29 that Iran would implement its “sovereignty and new policy” in the strait even if Iran and Oman failed to reach an agreement on the waterway’s future management.[9] Armed Forces General Staff-run outlet Defa Press similarly argued on June 30 that the strait is a “completely internal” matter that should not depend on the positions of regional states, including Oman.[10] These statements come amid Gulf opposition to Iranian control over the strait, including the publication of a Gulf Cooperation Council-US statement on June 25 that explicitly rejected any Iranian attempts to exert control over the strait.[11]

Iran and Oman appear to have at least some disagreements over the strait’s management, but any arrangement, regardless of fees, that recognizes Iranian control over the strait would be extremely problematic to US and Gulf interests as well as global commerce. An Iranian official and an unspecified regional diplomat told the *New York Times* on June 30 that Oman recently presented the United States with a proposal under which shipping companies would pay service fees to transit through the strait.[12] The regional diplomat stated that the fees would be voluntary, but

the Iranian official claimed they would be mandatory, which suggests that Iran and Oman disagree on this issue.[13] Iran has repeatedly signaled its intent to impose transit fees as part of its broader effort to consolidate control over the waterway.[14] Omani Foreign Minister Badr al Busaidi stated on June 29 that Oman does not support transit fees but did not rule out “mechanisms related to maritime services,” such as “enhancing navigation safety,” and “combating pollution.”^[15] Iran would likely attempt to assert sovereignty over the strait regardless of whether service fees for vessels were voluntary or mandatory. Iran could reward compliant shipping companies under a voluntary fee system by granting them priority transit through the strait. A senior Iranian official told CNN on April 18 that vessels that pay “security fees” and comply with Islamic Revolutionary Guards Corps (IRGC) protocols would receive priority transit through the Strait of Hormuz, while vessels that refused would face delays, for example.[16] Recognition of Iran’s authority over the strait, regardless of fees or not, would preserve Iran’s ability to selectively restrict maritime traffic and disrupt international markets whenever it serves Iranian interests.

US-Iran Negotiations

Iran announced that it will send a delegation to Doha, Qatar, on July 1 to discuss the implementation of the US-Iran MoU, but Iran continues to reject direct talks with the US delegation in Qatar and any discussion of its nuclear program.[17] A senior Qatari official said that US Special Envoy to the Middle East Steve Witkoff and Jared Kushner met with Qatari officials in Doha on June 30 but added that there are currently no high-level US-Iran meetings scheduled.[18] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on June 30 that the Iranian delegation will not meet with US officials but will meet with Qatari officials in Doha to discuss MoU clauses, including the release of frozen Iranian assets.[19] ISW-CTP continues to assess that Iran will likely use these talks to try to secure the implementation of provisions in the MoU that help advance Iranian objectives, including the provision about the release of Iranian frozen assets.[20] Iran has insisted on the United States releasing Iran’s frozen assets and implementing other provisions in the MoU before Iran agrees to discuss nuclear issues. Iranian officials, including Supreme Leader Mojtaba Khamenei, have not signaled any willingness to meet key US demands on Iran’s nuclear program, which include addressing the status of Iran’s highly enriched uranium stockpile and ability to enrich uranium on Iranian soil.[21]

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

ISW-CTP has observed a slight increase in Kurdish anti-regime activity along Iran’s northwestern border. It is possible that this activity is a response to Iranian internal security operations. Regime media reported on June 26 that an unspecified number of unidentified fighters killed two Iranian Law Enforcement Command (LEC) officers and injured two others in Baneh, Kurdistan Province.[22] Regime media also reported on June 30 that “terrorists” killed two Iranian security

personnel in Paveh, Kermanshah Province, on June 29.[23] A Norway-based human rights organization claimed that a newly formed armed group called “Xori Hiwa,” or Sun of Hope, claimed the attack in Paveh and that the group targeted IRGC personnel responsible for suppressing protests during the 2022-2023 Mahsa Amini protest wave.[24] Regime media separately reported on June 30 that IRGC Ground Forces Hamzeh Seyyed ol Shohada Operational Base forces killed four Kurdistan Free Life Party (PJAK) members in the vicinity of Mahabad and Piranshahr, West Azerbaijan Province.[25] This recent uptick in attacks could be a response to regime efforts to enhance internal security on Iran’s northwestern border. The regime has historically accused Kurdish armed groups of inciting anti-regime unrest in Iran. Armed Forces General Staff (AFGS)-run media reported on June 20 that the regime is closely monitoring fighters in Kurdistan, West Azerbaijan, and Kermanshah provinces and has replaced “purely defensive reactions” with an “active deterrence” doctrine.[26]

Iran’s Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

US Central Command (CENTCOM) will reportedly deploy ground forces to Israel and Lebanon to monitor compliance with the Trilateral Framework Agreement.[27] CENTCOM’s on-the-ground presence would likely enable the United States to more quickly identify and address potential Israeli or Hezbollah ceasefire violations and thereby limit Iran’s potential advantage in the recently established “deconfliction cell.” A US official told the *Washington Post* on June 29 that the United States will deploy ground forces to both Lebanon and Israel to monitor the implementation of the Trilateral Framework Agreement.[28] The official stated that the presence of US forces on the ground will enable US political leadership to engage with Lebanon and Israel and pressure both sides to uphold the agreement.[29] The official did not specify the scale or specific locations or timeframe of US deployments to Israel and Lebanon, however. ISW-CTP previously assessed that Iran would have an advantage in CENTCOM’s proposed “deconfliction cell” because the IRGC’s on-the-ground presence in Lebanon would enable Iran to more readily identify and report alleged ceasefire violations to the “deconfliction cell” and influence the narrative about those violations.[30] Israel is notably not part of the “deconfliction cell” and therefore would have to report ceasefire violations through the United States.[31] CENTCOM’s reported ground forces deployment to monitor the Trilateral Framework Agreement, if implemented, would likely reduce Iran’s advantage in the “deconfliction cell.” The presence of US military forces in Lebanon and Israel would almost certainly reduce the time it would take for US policymakers to receive tactical monitoring information and limit Iran’s current on-the-ground advantage.[32] CENTCOM representatives would also presumably be able to investigate and verify ceasefire violations with both the Israel Defense Forces (IDF) and Lebanese Armed Forces, which would reduce Iran’s ability to influence the narrative over incidents in the “deconfliction cell.”[33]

The IDF continued to strike and engage Hezbollah fighters in southern Lebanon on June 29 and 30. Lebanese media reported that the IDF conducted two airstrikes on June 29 targeting likely Hezbollah positions near Qantara and Deir Seryan, Marjaayoun District.[34] Lebanese media reported that the IDF later struck another site near Toulane, Marjaayoun District, on June 30.[35] Hezbollah fighters previously killed an IDF officer and wounded a soldier during a small arms engagement in Deir Seryan on June 28.[36] Israeli Prime Minister Benjamin Netanyahu reiterated on June 30 that Israeli forces will not withdraw from southern Lebanon until Hezbollah disarms.[37] Netanyahu also called on the IDF to act against Hezbollah threats in southern Lebanon.[38]

Other Axis of Resistance Activity

Nothing significant to report.

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CORRECTION: On July 2, ISW-CTP updated the sentence with endnote 25 to clarify that IRGC forces reportedly killed four PJAK members, as opposed to the inverse. We apologize for this error.

Iran Update Special Report, July 1, 2026

★ understandingwar.org/research/middle-east/iran-update-special-report-july-1-2026

Fiona Noonan

July 1, 2026



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 pushing the United States to unfreeze a significant amount of Iranian financial assets and acknowledge Iranian control of the Strait of Hormuz as part of the United States-Iran memorandum of understanding (MoU). Doing so would leave Iran in a significantly stronger strategic position and could support its military reconstitution efforts.
2. Iranian Parliament Speaker and Iran's negotiating delegation head Mohammad Bagher Ghalibaf's June 30 interview appears to be part of an effort to build intra-regime support for the MoU amid domestic backlash from the anti-negotiation camp. Ghalibaf argued that Iran will continue to collect fees from vessels transiting the Strait of Hormuz, implicitly arguing that the MoU supports Iranian claims of sovereignty over the strait.
3. Iranian officials are openly discussing expanding their missile ranges beyond the long-held 2,000-kilometer limit. A senior political adviser to former Supreme Leader Ali Khamenei, Brigadier General Rasoul Sanaei Rad, said on July 1 that Ali Khamenei had previously issued "phased" guidance to increase missile range and then improve missile accuracy.

Toplines

Iran is pushing the United States to unfreeze a significant amount of Iranian financial assets and acknowledge Iranian control of the Strait of Hormuz as part of the United States-Iran memorandum of understanding (MoU). Doing so would leave

Iran in a significantly stronger strategic position and could support its military reconstitution efforts. Iranian officials told Reuters that the Iranian delegation's talks with Qatari officials in Doha on July 1 would focus on unfreezing \$6 billion worth of Iranian financial assets and obtaining US recognition of Iranian sovereignty over the Strait of Hormuz.[1] The Iranian-Qatari meetings followed Qatari officials' meetings with US Special Envoy to the Middle East Steve Witkoff and Jared Kushner in Doha on June 30 to establish the US negotiating position.[2] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi confirmed on July 1 that the talks in Doha aimed to accelerate the implementation of the ceasefire in Lebanon, lift the US blockade on Iran, and release Iranian frozen assets.[3] Gharibabadi noted that the United States and Iran have formed specialized working groups to monitor the MoU implementation but that these working groups have not yet started talks.[4] Gharibabadi later claimed that Iranian and Qatari officials reached an agreement to unfreeze 6 billion US dollars' worth of Iranian financial assets to purchase and provide goods needed by Iran.[5] US and Qatari officials have yet to confirm Gharibabadi's specific claim, but a US official denied that the United States had agreed to unfreeze Iranian funds to Israeli media on July 1.[6] US Vice President JD Vance stated on June 22 that Iran would use unfrozen assets to purchase US agricultural products, following quadrilateral Iran-US-Qatar-Pakistan talks in Switzerland on June 21.[7] Iranian media subsequently denied that Iran agreed to purchase US agricultural products, however.[8] A US official told Axios on July 1 that Witkoff and Kushner attempted to convince the Iranian side that their demand for tolls in the strait could disrupt the whole MoU and that a diplomatic agreement would financially benefit Iran more than collecting tolls.[9] The US official did not comment on recognizing Iran's claims of sovereignty over the strait. Iranian Parliament Speaker and Iran's negotiating delegation head Mohammad Bagher Ghalibaf highlighted how Iran intended to voice its concerns over the United States' implementation of the MoU, including the demands for the US to fulfill Iran's stipulations, at the Doha talks in an interview on June 30.[10] Ghalibaf also said that Iran did not plan to conduct actual negotiations in Doha.[11]

Ghalibaf's June 30 interview appears to be part of an effort to build intra-regime support for the MoU amid domestic backlash from the anti-negotiation camp.

Ghalibaf argued that Iran will continue to collect fees from vessels transiting the Strait of Hormuz, implicitly arguing that the MoU supports Iranian claims of sovereignty over the strait.[12] Ghalibaf claimed that the MoU stipulates that Iran will retrieve half of its 24 billion US dollars' worth of frozen financial assets and that the Iranian Central Bank will use these funds "to purchase any goods it needs, at any price, and in any currency in the world." [13] Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi, who likely wields dominant influence over Iranian decision-making at the moment, has considered using the funds for military spending, according to mediators speaking to the *New York Times* on June 13.[14] Ghalibaf underlined in the interview the economic benefits of the MoU so far, including the lifting of the US naval blockade, which has allowed

Iran to export over 40 million barrels of oil at a price 20 percent higher than before the war.
[15]

The Pezeshkian administration has likewise tried to present Iranian leadership as unified in support of the MoU. Iranian President Masoud Pezeshkian emphasized that his administration has followed Supreme Leader Mojtaba Khamenei's guidance and is aligned with the Iranian armed forces, implicitly referring to the IRGC and Vahidi, in a meeting with the Islamic Propaganda Coordination Council on July 1.[16] Vice President for Executive Affairs Mohammad Jafar Ghaem Panah, an adviser to Pezeshkian, separately published the names of 11 of the 12 Supreme National Security Council members who voted for the MoU on June 30, which included ultra-hardline political leader Saeed Jalili.[17] Ghaem Panah likely published this list to appeal to the ultra-hardline camp, which has been the most critical of negotiations so far.[18] Hardline regime elements still appear concerned that the negotiating delegation may cross Supreme Leader Mojtaba's red lines, however. Sixty of 88 Assembly of Experts members, responsible for appointing and supervising the Supreme Leader, went so far as to issue a warning to negotiators not to violate Mojtaba's "red lines," in a 10-point statement on June 28.[19]

Iranian officials are openly discussing expanding their missile ranges beyond the long-held 2,000-kilometer limit. A senior political adviser to former Supreme Leader Ali Khamenei, Brigadier General Rasoul Sanaei Rad, said on July 1 that Ali Khamenei had previously issued "phased" guidance to increase missile range and then improve missile accuracy.[20] An Iranian Parliamentary National Security and Foreign Policy Committee member similarly said in October 2025 that Ali Khamenei had lifted all restrictions on Iran's missile ranges and that Iran would expand its missile program "wherever it sees fit." [21] Iran's known longest-range missiles are the Emad, Sejjil, and Shahab-3, which all have a reported range of 2,000 kilometers.[22] Iran may seek to develop missiles that can reach more distant US positions after its failed attempt to strike a US military base in Diego Garcia. Iran fired two ballistic missiles targeting the base in March 2026, which is located approximately 3,700 kilometers from Iran's southern border.[23] The attack marked the furthest-ever attempted Iranian missile strike, but one of the missiles failed in flight, and US forces intercepted the other.[24] Eighty-five Iranian parliamentarians also implicitly called for the development of intercontinental ballistic missile capabilities in a letter to Supreme Leader Mojtaba Khamenei on May 31.[25] The parliamentarians stated that Parliament will support Iran's military forces and defense industry until Iranian missiles can reach the United States.[26]

US-Iran Negotiations

See topline section.

Maritime Activity in the Strait of Hormuz and Persian Gulf

Nothing significant to report.

US and Israeli Air Campaign

Nothing significant to report.

Iranian Domestic Affairs

See topline section.

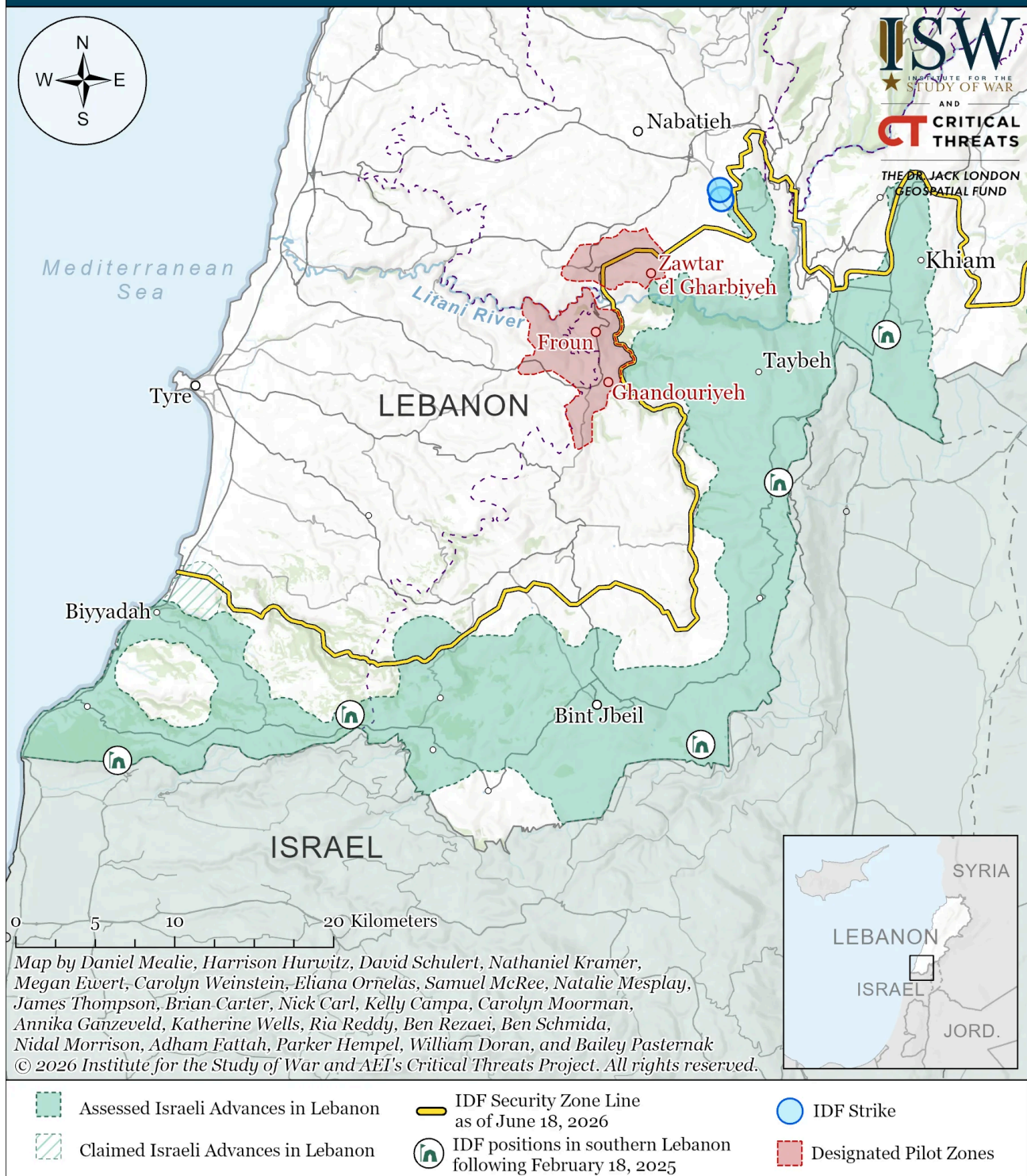
Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) has reportedly postponed its withdrawal from “pilot zones” in southern Lebanon until the IDF and Lebanese Armed Forces (LAF) establish a coordination mechanism and the LAF initiates efforts to disarm Hezbollah in the pilot zones, as required under the Trilateral Framework Agreement’s Security Annex.[27] Israeli media reported on June 29 that the IDF has postponed its withdrawal from the two pilot zones, surrounding Zawtar el Gharbiyeh, Nabatieh District, and territory surrounding Ghandouriyeh and Froun, Bint Jbeil District, until a “joint monitoring mechanism” is established between the IDF and LAF.[28] Israel and Lebanon agreed on June 26 in the Trilateral Framework Agreement’s Security Annex to a four-stage mechanism for the IDF and LAF to dismantle non-state armed groups in designated pilot zones in southern Lebanon.[29] The Annex’s model for disarming non-state groups in pilot zones closely resembles a “clear-hold-build” counterinsurgency strategy.[30] The Annex stipulates that Israel and Lebanon will establish the Military Coordination Group for Lebanon (MCG4L) to verify disarmament progress in southern Lebanon and operate as an indirect backchannel between the IDF and LAF.[31] Israeli sources said that the United States will vet the LAF soldiers who will participate in the MCG4L to ensure that Hezbollah does not receive sensitive information and that the MCG4L will operate as a “virtual [IDF-LAF] command center.”[32] Israeli security sources told Israeli media that there is currently no timetable for IDF withdrawal from the pilot zones and that the withdrawal “must be carried out properly.”[33] Israeli officials have repeatedly emphasized in recent days that the IDF will remain deployed to its security zone in southern Lebanon until Hezbollah is disarmed and no longer poses a threat to Israel.[34]

Israeli Strikes in Lebanon

Between June 30, 2026 at 2:00 PM ET and July 1, 2026 at 2:00 PM ET



Other Axis of Resistance Activity

Unspecified Iraqi Shia Coordination Framework leaders refused Iraqi Prime Minister Ali al Zaydi's request to arrest senior Iranian-backed Iraqi militia leaders as part of his recently launched anti-corruption campaign, according to Qatari media on July 1.[35] An unspecified source claimed that several framework leaders fear "security tensions" if the Iraqi federal government arrests senior militia leaders.[36] This report

comes as Iraqi media reported on July 1 that the Iraqi government has not arrested any Iranian-backed Iraqi militia-affiliated figures despite their known ties to corrupt officials.[37] Iraqi authorities reportedly issued an arrest warrant for a prominent unspecified militia-affiliated official, however.[38] Iraqi Kurdish and Saudi media reported on June 30 that Hussein Moanes, a member of Iranian-backed Iraqi militia Kataib Hezbollah's political wing, fled Iraq to an unknown country.[39] Zaydi's anti-corruption campaign follows US pressure on Baghdad to dismantle Iranian-backed Iraqi militia-linked financial networks and combat corruption.[40]

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Iran Update Special Report, July 2, 2026



Ben Rezaei, Bailey Pasternak, Nidal Morrison, Ria Reddy, Nicholas Carl

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.

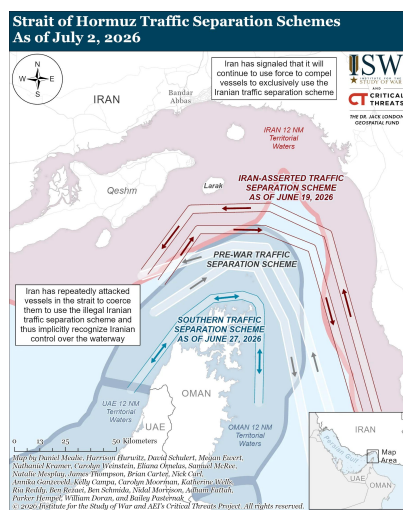
Key Takeaways

1. Iran has signaled that it will continue to use force to compel vessels to exclusively use the Iranian traffic separation scheme in the Strait of Hormuz as part of the broader Iranian effort to assert its claimed control of the strait. Iran has repeatedly attacked vessels in the strait to coerce them to use the illegal Iranian traffic separation scheme and thus implicitly recognize Iranian control over the waterway.
2. Iranian forces may have launched an effort against Kurdish militancy around the Iran-Iraq border. The exact military objectives are unclear at this time.

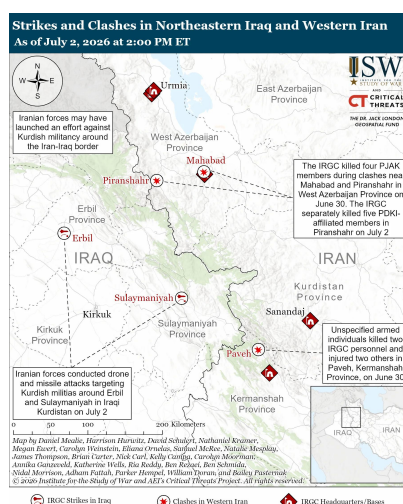
Toplines

Iran has signaled that it will continue to use force to compel vessels to exclusively use the Iranian traffic separation scheme in the Strait of Hormuz as part of the broader Iranian effort to assert its claimed control of the strait. Iran's top operational military headquarters, the Khatam ol Anbia Central Headquarters, warned on July 2 that Iran will deliver a "decisive and swift" response to any US interference in Iranian efforts to manage the strait.[1] The statement added that all oil tankers and commercial vessels must use the Iranian-designated route for safe passage and warned that the armed forces will respond to any vessel that uses an alternative route.[2] Iran has repeatedly attacked vessels in the strait to coerce them to use the illegal Iranian traffic separation scheme and thus implicitly recognize Iranian control over the waterway.[3] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi said on July 2 that the strait is under Iranian control, not that of US Central Command (CENTCOM), after CENTCOM hosted a regional security meeting in Bahrain with military commanders from Gulf and other regional states.[4] The meeting in Bahrain comes amid Gulf opposition to Iranian control over the strait.[5] Iran is meanwhile conducting a concerted diplomatic and military effort in response to the apparent resistance from Gulf countries to try to deter any international efforts to restore maritime traffic outside Iranian control.[6] Iran recently attacked commercial vessels in the strait after the International Maritime Organization (IMO) and Oman announced a new route on June

23 to move hundreds of stranded vessels through the strait through a designated safe route along the Omani coast, for example.[7]



Iranian forces may have launched an effort against Kurdish militancy around the Iran-Iraq border. Iranian forces conducted missile and drone attacks targeting Kurdish militias around Erbil and Sulaymaniyah in Iraqi Kurdistan on July 2.[8] The Islamic Revolutionary Guards Corps (IRGC) Ground Forces Hamzeh Seyyed ol Shohada Operational Base separately announced on July 2 that it ambushed a Democratic Party of Iranian Kurdistan (PDKI)-affiliated cell that entered Iran through the northwestern border and killed five of its members near Piranshahr, West Azerbaijan Province.[9] The IRGC claimed that the group carried improvised explosive devices.[10] Kurdistan Free Life Party (PJAK) separately confirmed on June 30 that the IRGC killed four of its members during clashes with IRGC Ground Forces Hamzeh Seyyed ol Shohada Operational Base personnel near Mahabad and Piranshahr in West Azerbaijan Province.[11] Unspecified armed individuals separately killed two IRGC personnel and injured two others in Paveh, Kermanshah Province, on June 30.[12] These operations come after Armed Forces General Staff-run outlet Defa Press stated on June 20 that the regime is closely monitoring fighters in Kurdistan, West Azerbaijan, and Kermanshah provinces and has replaced “purely defensive reactions” with an “active deterrence” doctrine.[13]



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.

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) has reportedly improved its ability to detect hostile first-person view (FPV) drones in northern Israel and southern Lebanon.[19] An unnamed senior IDF official told Israeli media on July 2 that IDF advancements in radar, artificial intelligence, and communication links to warning systems have reduced vulnerability to FPV drone attacks in southern Lebanon by 10 percent.[20] It is unclear how the official defines vulnerability to FPV drones, however. The official also said that drone warnings reach Israeli forces in southern Lebanon “within a few seconds,” giving soldiers more time to find cover or attempt to neutralize the drone.[21] The IDF reportedly began examining FPV drone countermeasures for its forces in southern Lebanon in April 2026.[22] Hezbollah has conducted increasingly sophisticated FPV drone attacks on Israeli forces in northern Israel and southern Lebanon since March 2026, including “swarm” attacks and nighttime attacks with FPV drones equipped with thermal cameras.[23]

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The IDF continued to strike Hezbollah fighters and clear Hezbollah infrastructure in southern Lebanon on July 2. The IDF reported on July 2 that its forces killed a Hezbollah fighter who emerged from an underground facility near Ali al Taher, Nabatieh Governorate.[24] The IDF reported on June 26 that its forces took “complete control” of Ali al Taher, which reportedly hosts one of Hezbollah’s largest underground command-and-control facilities.[25] Approximately 30 Hezbollah fighters remain in the facility, according to Israeli media.[26] Lebanese media reported on July 2 that the IDF conducted a one-way attack drone strike near Yater, Nabatieh Governorate.[27] The IDF also reported on July 2 that it recently seized two Hezbollah weapons caches in Nabatieh Governorate that contained rockets, mortars, improvised explosive devices, and other weapons.[28]

Other Axis of Resistance Activity

The United States has resumed some dollar shipments to Iraq, according to Iraqi federal government spokesperson Haider al Aboudi and a financial adviser to Iraqi Prime Minister Ali al Zaydi speaking to the *New York Times*.[29] Qatari media previously reported on June 17 that the United States recently delivered two shipments of US dollars to the Iraqi Central Bank, which coincided with US Special Envoy Tom Barrack’s visit to Baghdad.[30] The US dollar shipments were the first sent to Iraq since the US Treasury Department halted such shipments in April 2026 due to concerns about Iranian-backed Iraqi militia attacks during the war.[31] The Iraqi Central Bank has managed an account at the New York Federal Reserve that has held the Iraqi government’s oil export revenue in US dollars since 2003.[32] The resumption of US dollar shipments comes after Zaydi launched an anti-corruption campaign on June 28 targeting dozens of senior Iraqi officials following US pressure on the Iraqi government to disarm Iranian-backed Iraqi militias, dismantle their financial networks, and combat

corruption.[33] The United States reportedly conditioned economic support, likely including dollar shipments, for Zaydi's government on the Iraqi government's ability to meet US demands.[34]

An unnamed Iraqi official told the *New York Times* that the United States has not resumed its funding for Iraqi security services, however.[35] The United States suspended its funding for some counterterrorism and Iraqi Security Forces (ISF) training programs in April 2026 to pressure the Iraqi federal government to "dismantle" the militias.[36]

EndnotesMeta Boxes

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Iranian Domestic Affairs

A group of Iranian parliamentarians, largely comprised of individuals aligned with the ultra-hardline Paydari (Stability) Front, released a statement endorsing a different statement from some Assembly of Experts members that implicitly criticized the US-Iran memorandum of understanding (MoU) and US-Iran negotiations.[14] Iranian media reported on July 2 that a group of at least 84 parliamentarians issued a statement endorsing the recent statement by some Assembly of Experts members on June 28.[15] Sixty Assembly members issued a 10-point statement on June 28 in which they warned negotiators not to violate Supreme Leader Mojtaba Khamenei's red lines.[16] The Assembly of Experts Secretariat later clarified that the June 28 statement did not represent the Assembly's official position.[17] The statement from the parliamentarians echoes the Assembly members' hardline demands, which include solidifying Iranian control over the Strait of Hormuz, securing frozen assets and sanctions relief, forcing a US withdrawal from the region, and not discussing Iran's nuclear program in talks with the United States.[18] The Assembly of Experts and parliamentarians' statement reflects ongoing divisions within the regime between pro-negotiation factions that appear more willing to preserve negotiations and the MoU and anti-negotiation factions who continue to push maximalist and uncompromising positions.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

Lebanese Hezbollah and the Israeli Campaign in Lebanon

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Iran Update Special Report, July 3, 2026



Katherine Wells, Bailey Pasternak, Ria Reddy, Parker Hempel, 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 continues to insist on imposing an illegal toll scheme in the Strait of Hormuz despite Omani opposition to mandatory fees. The US-Iran memorandum of understanding (MoU) requires Iran to engage with Oman to determine the “future administration” of the strait, but recent reports indicate that Iran and Oman have different visions for the future management of the waterway.
2. Iranian officials appear to be trying to rally support for Iranian management of the strait by touting the alleged economic and security benefits of such management for regional countries. Iranian management of the strait would be detrimental to global commercial interests by enabling Iran to disrupt global trade and energy flows at will, however.
3. Iranian Supreme Leader Mojtaba Khamenei did not make a public appearance at the opening ceremony for the funeral of former Supreme Leader Ali Khamenei in Tehran on July 3, despite the attendance of most of Iran’s senior leadership and many foreign dignitaries.

Toplines

Iran continues to insist on imposing an illegal toll scheme in the Strait of Hormuz despite Omani opposition to mandatory fees. Iran reportedly rejected an Omani proposal to create a fund for “maritime services” that would be financed by voluntary donations from shipping and energy companies, according to people familiar with the discussions speaking to the *Wall Street Journal* on July 2.[1] The *New York Times*, citing an Iranian official, similarly reported on June 30 that Iran seeks to impose mandatory fees on vessels that transit through the strait.[2] A regional diplomat told the *New York Times* that Oman suggested making the fees voluntary, in contrast.[3] The US-Iran memorandum of understanding (MoU) requires Iran to engage with Oman to determine the “future administration” of the strait, but these reports indicate that Iran and Oman have different visions for the future management of the waterway.[4] Other Gulf states, with which Iran is also required to engage under the MoU, have similarly expressed opposition to Iranian control of the strait.[5] Iranian Parliament Speaker Mohammad Bagher Ghalibaf separately claimed that Iran and Oman’s management of the strait is “in accordance

with international law,” but any Iranian management of the strait in which Iran charged tolls would violate the United Nations Convention on the Law of the Sea (UNCLOS), which forbids states bordering international waterways from restricting transit passage or imposing transit charges.[6]

Iranian officials also appear to be trying to rally support for Iranian management of the strait by touting the alleged economic and security benefits of such management for regional countries. Iranian management of the strait would be detrimental to global commercial interests by enabling Iran to disrupt global trade and energy flows at will, however. Ghalibaf told his Uzbek counterpart on July 3 that Iranian control over the strait will bring “better opportunities” for the “development of transit cooperation” between Iran and Uzbekistan and reduce US interference in the region.[7] Ghalibaf’s comment comes as Iranian officials have recently called on regional countries to support a new “regional security mechanism” that Iran likely envisions would include Iranian control over the Strait of Hormuz and the removal of US forces from the Middle East.[8]

Iranian Supreme Leader Mojtaba Khamenei did not make a public appearance at the opening ceremony for the funeral of former Supreme Leader Ali Khamenei in Tehran on July 3, despite the attendance of most of Iran’s senior leadership and many foreign dignitaries.[9] Mojtaba has not been seen publicly since the war began and is reportedly recovering from injuries sustained in the strike that killed his father.[10] Key decision-maker and Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi also made his first public appearance since the US-Israel-Iran War at the ceremony.[11]

US-Iran Negotiations

Iran continues to exploit the ceasefire and memorandum of understanding (MoU) to try to replenish its economic resources and rebuild its defense capabilities in preparation for potential future conflict with the United States and Israel. Iran has begun talks with Japanese companies to buy Iranian oil, according to Iranian and Western sources speaking to Reuters on July 3.[12] The US-Iran MoU includes a 60-day oil sanctions waiver and states that the United States will lift all sanctions on Iran upon the signing of a final agreement. Japan was previously a large importer of Iranian oil prior to the imposition of US maximum pressure sanctions on Iran in 2018.[13] Iran’s talks with Japan suggest that Iran is attempting to use the sanctions waiver to rebuild its oil sales network with former economic partners. Iran separately appears to be using this period to fortify tunnel entrances at nuclear sites against potential future airstrikes or ground operations targeting these sites.[14] Iranian construction vehicles have been operating at the western tunnel entrances of the Kolang Gaz La Mountain site, according to the Institute for Science and International Security’s July 2 analysis of commercially available satellite imagery between June 21 and 30.[15] Iranian officials, including Qom Friday Prayer Leader Mohammad Saeedi, have also explicitly stated that Iran is using this period to reconstitute its defense capabilities.[16] Saeedi also expressed doubts about the US-Iran negotiations and stated that Iran will not compromise on its demands.[17] This recent Iranian activity is consistent with ISW-CTP’s ongoing assessment that the status quo—in which Iran is benefiting from economic relief from the MoU but has not had to make concessions on its nuclear program—is favorable for Iran. Iran’s acquisition of economic relief also strips the United States of leverage in later negotiations about Iran’s nuclear program.[18]

Maritime Activity in the Strait of Hormuz and Persian Gulf

See topline section.

US and Israeli Air Campaign

Nothing significant to report.

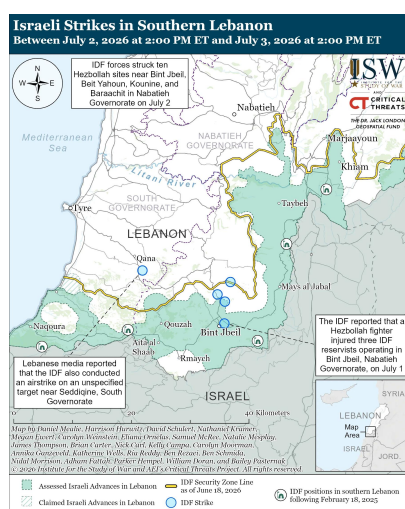
Iranian Domestic Affairs

See topline section.

Iran's Axis of Resistance

Lebanese Hezbollah and the Israeli Campaign in Lebanon

The Israel Defense Forces (IDF) and Hezbollah continued to engage each other in southern Lebanon on July 1 and 2.[19] The IDF reported that a Hezbollah fighter injured three IDF reservists in a small arms engagement in Bint Jbeil, Nabatieh Governorate, on July 1.[20] The IDF reported that it struck 10 Hezbollah sites near the towns of Bint Jbeil, Beit Yahoun, Kounin, and Baraachit in Nabatieh Governorate in response on July 2.[21] The IDF also reported on July 2 that it struck a Hezbollah vehicle that Hezbollah fighters were using to transport weapons and explosives near the IDF's security zone in southern Lebanon.[22] The IDF stated that the strike detonated the explosives inside the vehicle, causing a secondary blast.[23] Lebanese media reported on July 2 that the IDF also struck an unspecified target near Seddiquine, South Governorate.[24]



Other Axis of Resistance Activity

IRGC Quds Force-affiliated Mahan Air has resumed direct flights between Tehran and Houthi-controlled Sanaa, Yemen, for the first time in over 10 years, according to commercially available flight data.[25] Commercially available flight data shows that a Mahan Air plane flew from Tehran to Sanaa on July 3 and returned to Tehran a few hours later.[26] An Israeli military correspondent

reported on July 3 that the flight was transporting senior Houthi officials to former Iranian Supreme Leader Ali Khamenei's funeral ceremony in Tehran.[27] Iranian media and a US-based Yemen analyst reported on July 3 that the Mahan Air flight was the first direct flight between Iran and Yemen in over 10 years.[28] Mahan Air is a US-sanctioned Iranian airline that has frequently transported Quds Force funds, weapons, and operatives to support Iranian regional activities.[29] Houthi military spokesperson Yahya Sarea claimed that Saudi aircraft attempted to prevent the Mahan Air flight from landing in Sanaa, but that Houthi air defenses forced the Saudi aircraft to withdraw.[30] ISW-CTP has not observed any evidence that this incident took place at the time of this writing. Sarea warned Saudi Arabia that the Houthis would retaliate against any future Saudi "airspace violations" with strikes on Saudi airports and other "vital interests on land and sea." [31]

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Iran Update Special Report, July 4, 2026



Ben Rezaei, Ria Reddy, Parker Hempel, Kelly Campa, 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 continues to use threats and force to compel commercial vessels to transit through its illegal traffic separation scheme in the Strait of Hormuz. Alternative transit routes such as the route along Oman's coast undermine Iran's efforts to establish complete control over the Strait of Hormuz. Iran likely calculates that threats and continued attacks on vessels will deter countries and international organizations from facilitating such alternative transit routes.
2. Senior Iranian officials continue to portray the strait as Iran's primary source of leverage against the United States. Long-term Iranian control over the strait would enable Iran to close the waterway at any time and for any reason in order to make its adversaries meet Iranian demands and deter its adversaries from taking action against Iran.
3. Senior Iranian regime officials appear to be trying to contain growing factional disputes over Supreme Leader Mojtaba Khamenei's position on the US-Iran memorandum of understanding (MoU). Supreme Leader Representative to the Islamic Revolutionary Guards Corps (IRGC) Abdollah Haji Sadeghi told IRGC and Basij commanders and members in a letter on July 4 that Mojtaba's recent message on the MoU is the regime's final basis for action.
4. The Iranian regime appears to be reshuffling some senior military positions after the US-Israel-Iran war. Armed Forces General Staff (AFGS)-run media Defa Press reported that Rear Admiral Ali Ozmaei replaced Rear Admiral Alireza Tangsiri as the IRGC Navy commander.

Toplines

Iran continues to use threats and force to compel commercial vessels to transit through its illegal traffic separation scheme in the Strait of Hormuz. Bloomberg reported that at least eight vessels attempted to exit the strait along the Omani coast between July 2 and 3 before reversing course.[1] Some of the vessels later resumed transit through Iran's traffic separation scheme, almost certainly after Iranian authorities threatened to attack the vessels. Iran has previously threatened and attacked vessels that attempted to transit through the strait via alternative routes.[2] Iran attacked a

vessel on June 25 that was using the International Maritime Organization-Oman route, for example.[3] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi also warned the United Kingdom and France against engaging in any military activity in the strait in a statement on July 4 after both countries announced that they had agreed to work with Oman to ensure safe navigation for vessels through Omani territorial waters.[4] Alternative transit routes such as the route along Oman's coast undermine Iran's efforts to establish complete control over the Strait of Hormuz. Iran likely calculates that threats and continued attacks on vessels will deter countries and international organizations from facilitating such alternative transit routes.

Senior Iranian officials continue to portray the strait as Iran's primary source of leverage against the United States. Supreme Leader Military Affairs Adviser Major General Yahya Rahim Safavi warned on July 4 that Iran could use both the strait and the Bab al Mandeb as leverage if the United States violates the US-Iran memorandum of understanding (MoU).[5] Iranian Parliamentarian Malek Shariati similarly emphasized on July 3 the importance of Iranian control over the strait because of its important role for global energy markets.[6] Iran has repeatedly used force and the threat of force since April 2026 to control transit through the waterway to raise global oil prices and thus increase pressure on the United States and the broader international community to meet Iranian demands.[7] Iran announced the closure of the strait on June 20 to try to compel the United States to pressure Israel to halt operations against Hezbollah, for example.[8] Long-term Iranian control over the strait would enable Iran to close the waterway at any time and for any reason in order to make its adversaries meet Iranian demands and deter its adversaries from taking action against Iran.

Senior Iranian regime officials appear to be trying to contain growing factional disputes over Supreme Leader Mojtaba Khamenei's position on the US-Iran MoU. Supreme Leader Representative to the Islamic Revolutionary Guards Corps (IRGC) Abdollah Haji Sadeghi told IRGC and Basij commanders and members in a letter on July 4 that Mojtaba's recent message on the MoU is the regime's final basis for action.^[9] Mojtaba stated on June 18 that he had authorized the MoU but emphasized that he had "a different opinion in principle."^[10] Haji Sadeghi stated that debates over whether officials imposed the MoU on Mojtaba, acted negligently, or betrayed Mojtaba damage regime unity and do not align with Mojtaba's message.[11] Haji Sadeghi's statement follows recent public divisions among members of the Assembly of Experts — an 88-member clerical body that is responsible for appointing and supervising the Supreme Leader — and parliamentarians over the MoU and negotiations with the United States.[12] Sixty Assembly of Experts members issued a statement on June 28 warning negotiators not to violate Mojtaba's red lines.[13] The Assembly of Experts Secretariat later clarified that the statement did not represent the Assembly's official position.[14] A group of at least 84 parliamentarians, many of whom are aligned with the ultra-hardline Paydari (Stability) Front, endorsed the June 28 Assembly statement.^[15] Haji Sadeghi's directive to IRGC and Basij commanders suggests that senior regime officials close to the supreme leader and the IRGC are trying to prevent ultra-hardline factions from framing support for the MoU as disloyalty to Mojtaba.

The Iranian regime appears to be reshuffling some senior military positions after the US-Israel-Iran war. Armed Forces General Staff (AFGS)-run media Defa Press reported that Rear Admiral Ali Ozmaei replaced Rear Admiral Alireza Tangsiri as the IRGC Navy commander.[16] The Israel Defense Forces (IDF) killed Tangsiri in an airstrike targeting Bandar Abbas, Hormozgan Province, on March 26.[17] Ozmaei previously commanded the IRGC Navy 5th Imam Mohammad Bagher Region in Hormozgan Province, which oversees IRGC Navy operations in the southern Persian Gulf near the northern entrance of the Strait of Hormuz.[18] The United States sanctioned Ozmaei in June 2019 for acting on behalf of the IRGC and facilitating "destabilizing and provocative" actions around the strait.[19] The US sanctions against Ozmaei came after Iran conducted several attacks against commercial vessels in the Strait of Hormuz, including two tankers in early June 2019.[20] Iran's maritime escalation around the strait in

2019 was a response to US President Donald Trump's imposition of maximum pressure sanctions on Iran.[21] Some Iranian media outlets have also begun to publicly describe Major General Ahmad Vahidi as the IRGC commander instead of the IRGC deputy commander.[22] ISW-CTP assesses that Vahidi has been serving as the IRGC commander since the US-Israeli combined force killed the former commander on February 28.[23]

Defa Press separately referred to Khatam ol Anbia Central Headquarters Inspection Deputy Brigadier General Mohammad Jafar Asadi as the "former" inspection deputy on July 4.[24] Iranian media identified Asadi as the inspection deputy as recently as June 14.[25] It remains unclear whether Asadi was removed, reassigned, or promoted, however. This report comes after Defa Press described Major General Ali Abdollahi Aliabadi as the AFGS deputy chief, suggesting that Aliabadi may simultaneously serve as the AFGS deputy chief and Khatam ol Anbia Central Headquarters commander.[26] The new characterizations of Asadi and Aliabadi in Iranian media follow unconfirmed reports in December 2025 that former Supreme Leader Ali Khamenei was considering merging the AFGS and Khatam ol Anbia Central Headquarters.

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 Prime Minister Benjamin Netanyahu is reportedly seeking approval from US President Donald Trump before initiating an Israel Defense Forces (IDF) operation to seize remaining Hezbollah infrastructure in Ali al Taher, Nabatieh District, southeastern Lebanon, according to Israeli media on July 3.[27] The IDF reportedly postponed a planned operation to seize Hezbollah infrastructure in Ali al Taher on June 21 in order not to disrupt US-Iran negotiations.[28] An Israeli military correspondent reported on July 2 that approximately 30 Hezbollah fighters remain at an underground facility in Ali al Taher.[29] The IDF has continued to engage Hezbollah fighters who have emerged from the facility or have attempted to approach IDF positions surrounding Ali al Taher in recent days.[30] Ali al

Taher contains one of Hezbollah's largest underground command and control facilities and serves as a key reconnaissance position and launch site for Hezbollah attacks into northern Israel.[31] Ali al Taher also contains the headquarters of Hezbollah's Badr Unit, which is one of Hezbollah's geographic units that is responsible for the area north of the Litani River, particularly around Nabatieh District and the southern Bekaa Valley, and one of the main Hezbollah units that has engaged Israeli forces in southern Lebanon.[32]

Other Axis of Resistance Activity

The Houthis sent a senior fundraising official to Tehran as part of its delegation to former Supreme Leader Ali Khamenei's funeral, potentially to try to obtain funds from the Iranian regime. Houthi Endowments Authority Chairman Abdulmaged bin Abdulrahman bin al Hassan bin al Hussein al Houthi gave a speech at an event in Tehran on July 4 on the sidelines of Ali Khamenei's funeral.[33] The Houthi Endowments Authority is one of the Houthis' primary institutions for generating revenue, according to a Washington-based Yemen analyst.[34] Abdulmaged's visit follows reports that Iran intends to use part of the economic relief it gains from the US-Iran MoU to provide funding to Hezbollah.[35] Iran may consider using economic relief to support other regional proxies and partners, including the Houthis. Iranian officials have recently emphasized the value of the Houthis in the Axis of Resistance, particularly the Houthis' ability to disrupt shipping in the Red Sea in support of Iranian objectives. Iranian officials, including IRGC Quds Force Commander Brigadier General Esmail Ghaani and Supreme Leader Military Affairs Adviser Major General Yahya Rahim Safavi, continue to threaten that Iran and the Houthis could disrupt traffic through the Bab el Mandeb Strait alongside Iran's efforts to control shipping in the Strait of Hormuz.[36]

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