

Iran Update Special Report, August 2, 2026



Ben Rezaei, Bailey Pasternak, Benjamin Schmida, Katherine Wells, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

Key Takeaways

1. Iranian negotiators such as Foreign Affairs Minister Abbas Araghchi may be willing to make limited compromises with the United States over the extent of Iranian control over the Strait of Hormuz. The Islamic Revolutionary Guards Corps (IRGC) faction led by IRGC Commander Major General Ahmad Vahidi, which appears to be currently dominating regime decision-making, will likely reject any arrangement that meaningfully reduces Iranian control over the waterway, however.
2. US President Donald Trump stated on August 1 that he canceled planned strikes on Iran after Iran — presumably referring to Iranian negotiators — and regional states informed him that they had agreed on the parameters of a deal that reportedly includes the “immediate, complete, and total opening” of the strait and “an end to Iran’s nuclear threat.”
3. Israeli media also reported on August 2 that Araghchi agreed to a US- and Qatari-formulated proposal in which vessels would enter the Persian Gulf through Iranian waters and exit through Omani waters.
4. An arrangement in which Iran controls inbound traffic in the Strait of Hormuz would still enable Iran to control which vessels can enter the Persian Gulf and thus continue to undermine the United States’ interests as well as global commerce. Iranian officials have repeatedly emphasized that they seek to prevent “hostile” vessels, including US Navy vessels, from entering the Persian Gulf.
5. Some Iranian regime officials may be seeking to appease ultra-hardliners by emphasizing that the regime is exploiting pauses in US military operations and periods of diplomacy to reconstitute military capabilities and import new equipment. Iranian Artesh Spokesperson Brigadier General Mohammad Akraminia explicitly stated on August 2 that Iran “fully exploited” the MoU and ceasefire to import new equipment, repair and reconstruct damaged systems, and produce new

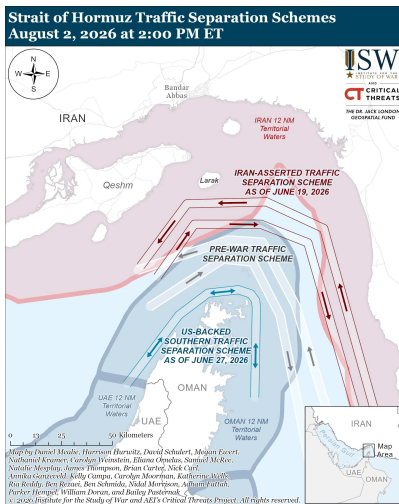
systems.

Toplines

Iranian negotiators such as Foreign Affairs Minister Abbas Araghchi may be willing to make limited compromises with the United States over the extent of Iranian control over the Strait of Hormuz. The Islamic Revolutionary Guards Corps (IRGC) faction led by IRGC Commander Major General Ahmad Vahidi, which appears to be currently dominating regime decision-making, will likely reject any arrangement that meaningfully reduces Iranian control over the waterway, however. US President Donald Trump stated on August 1 that he canceled planned strikes on Iran after Iran—presumably referring to Iranian negotiators — and regional states informed him that they had agreed on the parameters of a deal that reportedly includes the “immediate, complete, and total opening” of the strait and “an end to Iran’s nuclear threat.”[1] The *Wall Street Journal* reported on August 2 that Qatari mediators presented Iran with a new proposal to reopen the strait and that Iranian diplomats responded “positively.”[2] Israeli media also reported on August 2 that Araghchi agreed to a US- and Qatari-formulated proposal in which vessels would enter the Persian Gulf through Iranian waters and exit through Omani waters.[3] An Iranian official previously told Reuters on July 29 that Iran must control the strait’s “entire inbound route” and “part of the outbound route.”[4] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei stated on August 2 that the transit route agreed upon in the proposal is neither the current Iranian traffic separation scheme nor the southern route along Oman’s coast and emphasized that the proposal “has nothing to do with” opening the strait.[5] **An arrangement in which Iran controls inbound traffic in the Strait of Hormuz would still enable Iran to control which vessels can enter the Persian Gulf and thus continue to undermine the United States’ interests as well as global commerce.** Iranian officials have repeatedly emphasized that they seek to prevent “hostile” vessels, including US Navy vessels, from entering the Persian Gulf.[6]

IRGC-affiliated Fars News denied on August 2 that Iran agreed to a plan to reopen the strait.[7] An informed Iranian military source told Fars News that the strait will remain closed as long as the United States continues to conduct “hostile actions.”[8] The source added that vessels can only transit through Iran’s traffic separation scheme and with permission from the IRGC Navy.[9] This report highlights how some IRGC factions, likely including Vahidi’s faction, seek to retain full control over all traffic in the strait and likely oppose an arrangement in which Iran would only control inbound traffic in the strait. The IRGC controls the forces that have repeatedly attacked shipping in the strait in recent months, and it could therefore try to undermine an arrangement in the Strait of Hormuz that it deems contrary to the regime’s interests.

Iranian negotiators’ reported openness to the US- and Qatari-formulated proposal is consistent with Iranian “pragmatist” actors’ support for negotiating a diplomatic settlement to advance Iranian objectives. “Pragmatist” officials such as Araghchi, Parliament Speaker Mohammad Bagher Ghalibaf, and President Masoud Pezeshkian have consistently advocated for using diplomacy to secure Iranian interests, such as securing Iranian control over the Strait of Hormuz and obtaining economic relief.[10] Iranian President Masoud Pezeshkian has repeatedly voiced concerns about the economic costs of war, and he convinced Supreme Leader Mojtaba Khamenei to accept the memorandum of understanding (MoU) in June by highlighting the MoU’s economic benefits.[11]



Some Iranian regime officials may be seeking to appease ultra-hardliners by emphasizing that the regime is exploiting pauses in US military operations and periods of diplomacy to reconstitute military capabilities and import new equipment. Iranian Artesh Spokesperson Brigadier General Mohammad Akraminia explicitly stated on August 2 that Iran “fully exploited” the MoU and ceasefire to import new equipment, repair and reconstruct damaged systems, and produce new systems.[12] Akraminia made these remarks in response to criticism from ultra-hardline parliamentarians affiliated with the Paydari (Stability) Front who reject diplomacy with the United States.[13] Akraminia may have sought to reassure these critics that the ceasefire strengthened Iran’s military position rather than forced Iran to concede to the United States or abandon its objectives.

Akraminia’s remarks also corroborate ISW-CTP’s assessment that Iran has exploited pauses in fighting and the MoU to reconstitute its military capabilities in preparation for potential renewed conflict with the United States and Israel.[14] Akraminia added that Iran has developed new drones during the ceasefire that Iran recently used in attacks against US bases in Gulf states.[15] Iranian media reported on July 29 that Iran recently used an upgraded version of the Hadid 110 drone for the first time.[16] This drone uses a jet engine and solid-fuel booster to fly lower and faster with greater stealth, likely reducing air defense detection and interception time.[17]

Akraminia’s reference to “importing new equipment” may include Iran’s reported recent purchases of Russian Verba and Chinese shoulder-fired man-portable air-defense systems (MANPADS).[18] Iran has reportedly used “Russian-enhanced versions” of Shahed drones and Russian targeting intelligence to attack US forces and assets during the war, according to US intelligence officials.[19]

US and Partner Military Operations

See topline section.

Iranian Strike Campaign

Assessed Iranian War Aims:

- ***Secure international recognition of Iranian control over the Strait of Hormuz***
- ***Degrade the US ability and willingness to continue the war***
- ***Restore deterrence vis-à-vis the United States and its regional partners***

- ***Divide the United States and Israel from the Arab states***

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

See topline section.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

Nothing significant to report.

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[2]

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Iran Update Special Report, August 3, 2026



Ben Rezaei, Adham Fattah, Benjamin Schmida, William Doran, Katherine Wells, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

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Key Takeaways

1. Iranian Supreme Leader Mojtaba Khamenei may be trying to reduce President Masoud Pezeshkian and other “pragmatist” officials’ ability to influence the regime’s approach toward the United States in the current conflict. Senior cleric Mohammad Bagher Kharrazi, who has familial ties to Mojtaba, claimed on August 3 that Mojtaba formally warned Pezeshkian that he would accept Pezeshkian’s resignation if Pezeshkian tried to resign again. Mojtaba may have made this warning to prevent Pezeshkian from using the threat of his resignation to influence regime policies.
2. Kharrazi’s comments come as a contingent of “pragmatist” regime officials has directly and indirectly questioned how much effort the regime should exert to control the Strait of Hormuz. Former Iranian Foreign Affairs Minister Mohammad Javad Zarif, who played a central role in the 2015 Joint Comprehensive Plan of Action (JCPOA) negotiations, warned on August 3 that a prolonged closure or “short-term exploitation” of the Strait of Hormuz could generate an international consensus against Iran, including from the People’s Republic of China (PRC).
3. The Islamic Revolutionary Guard Corps (IRGC) faction that currently appears to be dominating regime decision-making has likely not diverged from its maximalist positions and will likely maintain these positions in reported upcoming talks with the United States, however. Supreme Leader Military Adviser Major General Mohsen Rezaei, whom ISW-CTP assesses is part of the IRGC faction controlling regime decision-making, stated on August 3 that Iran will not allow the use of a second corridor in the strait “under any circumstances.”
4. The IRGC continued to use force to assert Iranian control over the Strait of Hormuz on August 2, which reflects the IRGC’s unwillingness to compromise on its control over the waterway. United

Kingdom Maritime Trade Operations (UKMTO) reported on August 2 that an explosion occurred near a civilian vessel off the coast of Oman.

5. Mojtaba may be trying to increase his influence over key regime institutions, including the Supreme National Security Council (SNSC). Kharrazi claimed that Mojtaba wants to replace Vahidi-appointed SNSC Secretary Mohammad Bagher Zolghadr with one of his military advisers, former IRGC Commander Major General Mohsen Rezaei. Iranian outlet Tabnak, which is affiliated with Rezaei, notably circulated Kharrazi's claim.

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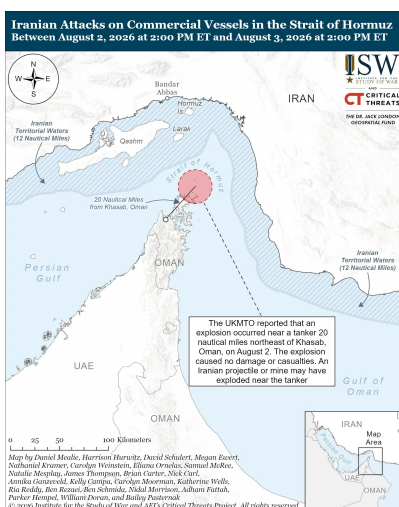
Iranian Supreme Leader Mojtaba Khamenei may be trying to reduce President Masoud Pezeshkian and other “pragmatist” officials’ ability to influence the regime’s approach toward the United States in the current conflict. Senior cleric Mohammad Bagher Kharrazi, who has familial ties to Mojtaba, claimed on August 3 that Mojtaba formally warned Pezeshkian in a written statement that he would accept Pezeshkian's resignation if Pezeshkian tried to resign again.[1] Kharrazi claimed that the warning caused Pezeshkian to “back down.”[2] Mojtaba may have made this warning to prevent Pezeshkian from using the threat of his resignation to influence regime policies. Four senior Iranian officials told the *New York Times* on July 4 that Pezeshkian previously threatened to resign if Mojtaba rejected the US-Iran memorandum of understanding (MoU), which increased pressure on Mojtaba to approve the deal.[3] Mojtaba stated on June 18 that he had authorized the MoU despite holding “a different opinion in principle” and emphasized that Pezeshkian and the Supreme National Security Council (SNSC) are responsible for protecting Iranian and Axis of Resistance interests.[4] ISW-CTP assessed on June 18 that Mojtaba likely placed responsibility for the agreement on Pezeshkian and the SNSC to distance himself from any failure resulting from the MoU or negotiations.[5] Kharrazi does not appear to hold significant influence over current regime decision-making, and he provided no evidence to substantiate his claims. His remarks are nevertheless noteworthy given his familial ties to Mojtaba Khamenei and Kamal Kharrazi, who previously served as a senior adviser to the Supreme Leader.[6]

Kharrazi's comments come as a contingent of “pragmatist” regime officials has directly and indirectly questioned how much effort the regime should exert to control the Strait of Hormuz. Former Iranian Foreign Affairs Minister Mohammad Javad Zarif, who played a central role in the 2015 Joint Comprehensive Plan of Action (JCPOA) negotiations, warned on August 3 that a prolonged closure or “short-term exploitation” of the Strait of Hormuz could generate an international consensus against Iran, including from the People's Republic of China (PRC).[7] Zarif added that Iran has a time-sensitive window of opportunity to capitalize on its control of the strait and argued that Iran should use the strait as leverage in negotiations to recover economically and avoid further US military action.[8] Zarif previously served as the vice president for strategic affairs under President Masoud Pezeshkian, who has similarly advocated for a diplomatic settlement to end the war.[9] Pezeshkian stated on August 2 that all SNSC members supported the MoU and that Iran must strive to compel the United States to uphold it, suggesting that Pezeshkian supports a return to the MoU and may, therefore, not support continued fighting over the Strait of Hormuz.[10] An Iranian media outlet that was previously associated with Iran's chief negotiator and Parliament Speaker Mohammad Bagher Ghalibaf also argued in July that Iran does not have to allocate excessive resources to controlling the strait, particularly if doing so requires Iran to sacrifice other objectives, such as preserving its nuclear program or ensuring regime stability.[11] Araghchi, who is also part of Iran's negotiating delegation, also reportedly expressed support for a recent US- and Qatari-formulated proposal in which inbound traffic in the Strait of Hormuz would go through Iranian waters while outbound traffic would pass through Omani waters.[12]

The Islamic Revolutionary Guard Corps (IRGC) faction that currently appears to be

dominating regime decision-making has likely not diverged from its maximalist positions and will likely maintain these positions in reported upcoming talks with the United States. US President Donald Trump announced on August 2 that US and Iranian officials would soon meet to discuss reopening the Strait of Hormuz and nuclear issues.[13] Supreme Leader Military Adviser Major General Mohsen Rezaei, whom ISW-CTP assesses is part of the IRGC faction controlling regime decision-making, stated on August 3 that Iran will not allow the use of a second corridor in the strait “under any circumstances.”[14] It is unclear whether Rezaei was referring to the recent proposal about inbound and outbound traffic or the current southern route along the Omani coast, but Rezaei’s statement nevertheless highlights his view that traffic through the Strait of Hormuz must only pass through Iran’s traffic separation scheme. The *Wall Street Journal* separately reported on August 3 that Iranian negotiators supported the proposal on inbound and outbound traffic but that they are awaiting approval from the IRGC.[15] This report highlights how the IRGC continues to wield outsized authority in the regime. On August 2, IRGC-affiliated media denied that Iran had agreed to reopen the strait. The Assembly of Experts, which is an 88-member clerical body that is responsible for appointing and supervising the Supreme Leader, separately described on August 3 “calls for surrender” in negotiations with the United States as an “unforgivable betrayal” and grounds for legal action.[16]

The IRGC continued to use force to assert Iranian control over the Strait of Hormuz on August 2, which reflects the IRGC’s unwillingness to compromise on its control over the waterway. United Kingdom Maritime Trade Operations (UKMTO) reported on August 2 that an explosion occurred near a civilian vessel off the coast of Oman.[17] An Iranian projectile or mine may have exploded near the tanker. The IRGC Navy has repeatedly attacked vessels attempting to transit through the strait using the southern route along Oman’s coast because traffic on this route undermines Iranian efforts to assert full control over the strait.



Mojtaba may be trying to increase his control over key regime institutions. Kharrazi claimed that Mojtaba wants to replace SNSC Secretary Mohammad Bagher Zolghadr with Major General Mohsen Rezaei.[18] The SNSC is the regime’s highest national security and foreign policy decision-making body.[19] IRGC Commander Major General Ahmad Vahidi previously pressured Pezeshkian to appoint Zolghadr as the SNSC secretary.[20] Mojtaba appointed Rezaei as one of his military advisers in March.[21] Rezaei’s appointment as a military adviser was one of only three political appointments that Mojtaba has made since becoming Supreme Leader in March.[22] Mojtaba’s reported desire to replace Zolghadr with Rezaei may reflect an effort by Mojtaba to assert more direct control over the SNSC by removing Vahidi’s appointee and replacing him with Rezaei, who is part of his inner circle. Iranian outlet Tabnak, which is affiliated with Rezaei, notably circulated Kharrazi’s claim.[23]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

- Secure international recognition of Iranian control over the Strait of Hormuz
- Degrade the US ability and willingness to continue the war
- Restore deterrence vis-à-vis the United States and its regional partners
- Divide the United States and Israel from the Arab states

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

An Artesh Ground Forces special forces brigade reportedly conducted multiple ground raids against Kurdish opposition groups in Iraqi Kurdistan, which would be consistent with the Iranian regime's heightened concern about the threat that these groups pose to Iranian security.[24] An adviser to the Artesh commander, Brigadier General Mojtaba Jafari, claimed on August 3 that the Artesh's "23rd Nohed Brigade" conducted at least 14 raids against anti-regime Kurdish fighters in Erbil and Sulaymaniyah provinces, killing and capturing several Kurdish fighters.[25] No Iraqi or Kurdish sources have confirmed Jafari's claim at the time of this writing, and it remains unclear when the Iranian special forces raids took place. Jafari made the claim during a press conference discussing Iranian armed forces achievements during the 12-Day War and the current US-Iran War, suggesting that the Artesh conducted these raids in one or both of these conflicts.[26] The "23rd Nohed Brigade" is likely the Artesh Ground Forces 65th Airborne Special Forces Brigade, also referred to as NOHED, which separated from the Artesh Ground Forces 23rd Division in the early 1990s.[27] The 65th Brigade is an elite Artesh special forces unit that specializes in irregular warfare and previously deployed to Syria during the civil war in 2016.[28]

Jafari's claim comes amid heightened regime concern about the threat of Kurdish opposition groups. IRGC Ground Forces Commander Brigadier General Mohammad Karami threatened to turn northwestern Iran into a "graveyard" if anti-regime groups attacked Iranian forces during a field tour of the IRGC Ground Forces Hamzeh Seyyed ol Shohada Operational Base in northwestern Iran on August 3.[29] Karami's statement follows an increase in Kurdish anti-regime activity along Iran's northwestern border, including a likely Kurdistan Free Life Party (PJAK) engagement with IRGC forces from the IRGC Ground Forces Hamzeh Seyyed ol Shohada Operational Base in Mahabad and Piranshahr cities in West Azerbaijan Province.[30] Armed Forces General Staff-run Defa Press previously reported in June that Iran had replaced "purely defensive reactions" with an "active deterrence" doctrine against Kurdish fighters while closely monitoring Kurdish-populated provinces.[31] Iran may have also deployed reinforcements to the

Iran-Iraq border in July over concerns that Kurdish opposition groups would exploit heightened US-Iran tensions, according to Iraqi media.[32] Iran and Iranian-backed Iraqi militias have consistently conducted drone attacks on anti-regime Kurdish fighters since the US-Iran War began on February 28.[33] Jafari's statement is the first claim that ISW-CTP has observed that Iran has conducted ground operations against these groups in the conflict, however.

Lebanon

Lebanese President Joseph Aoun met with the Beirut Rafic Hariri International Airport Security Chief, Lebanese Armed Forces (LAF) Brigadier General Fadi Kfoury, on August 3 to discuss efforts to strengthen airport security.[34]

The Lebanese government did not publish details of what measures Aoun and Kfoury discussed. Aoun and Kfoury's meeting comes amid recent tensions between the Lebanese government and Hezbollah over Hariri International Airport. Hezbollah Political Council Deputy Chairman Mahmoud Qamati threatened on July 21 that Hezbollah may shut down the airport in response to Lebanese government restrictions on Iranian influence in Lebanon.[35] Hezbollah officials and supporters have long accused Kfoury of serving US interests against Hezbollah and enforcing discriminatory sectarian practices against Shia employees at Hariri International Airport as part of Hezbollah's broader effort to delegitimize the Lebanese government.[36]

Iraq

Nothing significant to report.

Arabian Peninsula

Yemeni military sources told Saudi media on August 3 that the Houthis have reinforced drone and missile launch sites on the Red Sea coast with IRGC assistance, which suggests more extensive Houthi coordination with the IRGC in recent weeks.[37] The sources claimed that the IRGC helped the Houthis reinforce launch sites on high ground overlooking the Bab al Mandeb Strait and the Houthis' main port at Hudaydah.[38] The sources added that the Houthis have also developed a base for conducting attacks using explosive fast attack craft, drones, and missiles on Kamaran Island in the Red Sea, although the sources did not specify whether IRGC operatives assisted the Houthis on Kamaran Island as well.[39] The Houthis have reportedly coordinated directly with the IRGC and other Axis of Resistance members in recent weeks to advance shared interests. These interests include weakening Saudi Arabia's willingness to continue its blockade against the Houthis and resisting Iranian control of the Strait of Hormuz.[40] Iranian sources told Reuters on July 23 that the IRGC dispatched senior commanders and advisers with weapons components and gold to Houthi-controlled territory on July 13, shortly before the Houthis imposed a blockade on Saudi Arabia in the Red Sea on July 20.[41] A Yemeni journalist also reported that US-Saudi airstrikes in Iraq killed a senior Houthi member on July 29.[42] Regional sources separately told Reuters on July 30 that Saudi Arabia has assessed that the Houthis conducted attacks on Saudi Arabia from Iraqi territory in coordination with the IRGC and Iraqi militias.[43]

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Iran Update Special Report, August 4, 2026



Katherine Wells, Nidal Morrison, Carolyn Moorman, William Doran, Bailey Pasternak, Parker Hempel, Benjamin Schmida, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

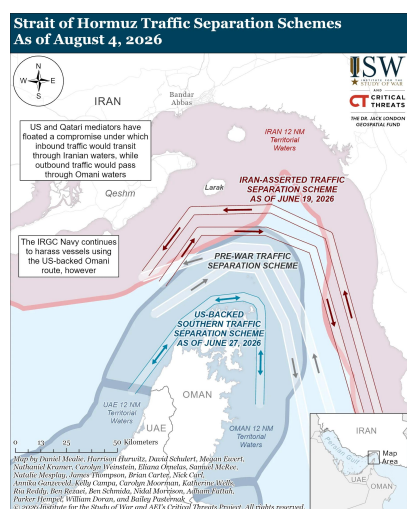
Key Takeaways

1. US officials and Iranian negotiators continue to present competing interpretations of the emerging arrangement on the Strait of Hormuz. The Iranians' inconsistent messaging in these negotiations is likely a product of the competing Iranian regime factions' approaches to control over the strait and negotiations with the United States writ large.
2. Iran's broader military establishment, which appears to currently dominate regime decision-making, maintains its position against significant concessions over the Strait of Hormuz because they assess that Iran can outlast the United States in the war.
3. Iranian President Masoud Pezeshkian and other pro-negotiations officials continue to advocate for diplomacy to settle the conflict and prioritize Iran's economic challenges, while facing mounting pressure from the other regime factions that oppose compromise and seek more maximalist regional objectives. This intra-regime divide will likely impede Iran's ability to concretely come to an arrangement over the strait.
4. Supreme Leader Mojtaba Khamenei appears to be downplaying these intra-regime divisions to portray a unified front against the United States, however. The Supreme Leader's Public Relations Office on August 4 rejected reports claiming to describe Mojtaba's reaction to a letter from Pezeshkian.
5. The Houthi military spokesperson Yahya Sarea claimed that a Houthi drone struck a "sensitive target" at Najran Regional Airport, southern Saudi Arabia, on August 4. An informed regional source told Agence France-Presse (AFP) on August 4 that the Houthis struck the Najran Regional Airport's main radar installation, which has affected airport operations.

6. The Houthis likely sank an Indian-flagged cargo vessel with a one-way naval attack drone near the Bab al Mandeb Strait. Indian Minister of Ports, Shipping, and Waterways Sarbananda Sonowal announced on August 4 that an unspecified projectile struck and sank the Indian-flagged MSV *FAIZE NOORE OLIYA* “near Yemeni waters.”

Toplines

US officials and Iranian negotiators continue to present competing interpretations of the emerging arrangement on the Strait of Hormuz. The Iranians’ inconsistent messaging in these negotiations is likely a product of the competing Iranian regime factions’ approaches to control over the strait and negotiations with the United States writ large. US officials, including US President Donald Trump and US Secretary of State Marco Rubio, continue to insist that the strait must remain open to international shipping and not be subject to Iranian control.[1] Western reporting on August 3 and 4, citing regional mediators, suggests that US and Qatari mediators have floated a compromise to return traffic through the strait to pre-war levels – a US objective – under which inbound traffic would transit through Iranian waters, while outbound traffic would pass through Omani waters.[2] US and regional officials made it clear in these talks that this system would not involve tolls, according to these reports.[3] Western media also reported on August 4, citing regional mediators and a senior Iranian source, that Iranian diplomats sought to retain maritime monitoring and intervention rights while demanding “service fees,” blockade relief, and sanctions relief, however.[4] The Iranian Foreign Affairs Ministry is concurrently framing talks over this arrangement as an issue to be managed between Iran and Oman rather than part of broader US-Iran negotiations.[5] Iran’s negotiating team may be framing these talks as such, to avoid the appearance of agreeing to a US-brokered plan over the strait and of conceding to the United States, to its domestic audience, amid pressure from other negotiation-skeptical regime factions.



Iran’s broader military establishment, which appears to currently dominate regime decision-making, maintains its position against significant concessions over the Strait of Hormuz because they assess that Iran can outlast the United States in the war. The supreme leader’s military adviser, Major General Mohsen Rezaei, told regime media on August 3 that Iran should not abandon its control over the strait, while claiming that Iran’s drone and missile attacks on US regional bases have compelled US commanders, forces, and equipment further out of the region.[6] This implies that Rezaei believes that the United States is not willing to keep its forces close to Iran where they can be struck more easily. Rezaei’s stance is reflective of the broader continued confidence among the Islamic Revolutionary Guards Corps (IRGC) faction exemplified by Major General Ahmad Vahidi.[7] This faction

controls Iran's current military operations, including the IRGC Navy's continued coercive actions to disrupt shipping through the strait aimed at reinforcing Iranian claims over the strait and threatening the shipping companies, both of which impose costs on the United States.[8] The United Kingdom Maritime Trade Operations (UKMTO) reported on August 4 that the IRGC Navy harassed a vessel on August 2, before an unknown projectile fell in the vessel's vicinity, which suggests that the IRGC Navy conducted the subsequent failed attack on the vessel.[9]

Iranian President Masoud Pezeshkian and other pro-negotiation officials continue to advocate for diplomacy to settle the conflict and prioritize Iran's economic challenges, while facing mounting pressure from the other regime factions that oppose compromise and seek more maximalist regional objectives. This intra-regime divide will likely impede Iran's ability to concretely come to an arrangement over the strait.[10] Pezeshkian and former Iranian Foreign Affairs Minister Mohammad Javad Zarif, who played a central role in the 2015 Joint Comprehensive Plan of Action (JCPOA) negotiations, publicly voiced their support for diplomatic engagement on August 3 and 4.[11] Zarif recommended that Iran use the strait as a "bargaining chip" to extract further economic relief from the United States.[12] Pezeshkian has publicly defended his pro-negotiation stance and indicated he will remain president despite speculation that Iranian officials are pressuring him to leave office.[13] This speculation escalated after senior cleric Mohammad Bagher Kharrazi, who has familial ties to Supreme Leader Mojtaba Khamenei, claimed on August 3 that Mojtaba formally warned Pezeshkian in a written statement that he would accept Pezeshkian's resignation if Pezeshkian tried to resign again.[14] Kharrazi claimed that a warning from Mojtaba caused President Pezeshkian to "back down," hinting that Mojtaba sought to prevent Pezeshkian from using resignation threats to influence regime policy after Pezeshkian reportedly threatened to resign if Mojtaba rejected the US-Iran memorandum of understanding (MoU) in May.[15] The Supreme Leader's Public Relations Office on August 4 rejected reports claiming to describe Mojtaba's reaction to a letter from Pezeshkian, almost certainly in response to Kharrazi's August 3 statement, however.[16]

The report that Mojtaba warned Pezeshkian that he would accept any future resignation, if true, suggests that Mojtaba is strongly supportive of the IRGC faction's current efforts to accomplish their maximalist objectives through force during negotiations. It would also demonstrate that Mojtaba is unwilling to let Iranian officials use resignation threats as a political tool to box in the supreme leader.

Ultra hardline parliamentarians have intensified public criticism of the government's diplomatic approach and are increasingly portraying negotiations as a sign of weakness. Paydari (Stability) Front-affiliated Parliamentarian Hosseinali Hajideligani stated that lawmakers are preparing impeachment proceedings against Foreign Minister Araghchi because they believe he failed to force the United States to accept maximalist Iranian demands.[17] Hajideligani suggested that they could also impeach Pezeshkian in response to a question about Pezeshkian's pro-negotiations stance.[18] The demands cited by Hajideligani include preserving complete Iranian control over the strait, removing Israeli forces from Lebanon, and pushing the United States out of the region.[19] Hajideligani is the deputy chairman of Parliament's Article 90 Committee that investigates parliamentary complaints against executive, legislative, and judicial branches.[20] It is possible that other negotiations-skeptic factions or individuals, including Mojtaba himself and Vahidi, are also putting political pressure on the negotiating team. Such pressure is likely a factor contributing to the slow progress of the strait negotiations, as Iranian negotiators seek to balance diplomatic objectives against intra-regime constraints.

Supreme Leader Mojtaba Khamenei appears to be downplaying these intra-regime divisions to portray a unified front against the United States, however. The Supreme Leader's Public Relations Office on August 4 rejected reports claiming to describe Mojtaba's reaction to a letter from Pezeshkian.[21] The Public Relations Office emphasized that only the Office of the Supreme Leader and

the Office for the Preservation and Publication of the Leader's Works are authorized to publish messages, statements, and positions attributed to Mojtaba.[22] The statement asserted that circulating social media quotations and reports fueled public concern and political division, and stressed that material published outside official channels lacked "authenticity and validity." [23] The office further highlighted that Mojtaba has consistently emphasized the importance of preserving national unity and maintaining the dignity of government officials, "especially the esteemed government." [24]

US and Partner Military Operations

The United States has continued to enforce its naval blockade against Iranian ports and vessels that it reimposed on July 14.[25] US Central Command (CENTCOM) confirmed on August 4 that US forces have redirected 45 commercial vessels, disabled two vessels, and boarded two vessels to ensure compliance with its blockade on Iranian ports.[26] UKMTO reported that an unknown projectile struck the engine room of a cargo ship that was transiting northbound of the Strait of Hormuz in Omani territorial waters on August 3, causing fire and a power outage on the vessel.[27] Iranian media reported on August 4 that an "unknown projectile" hit a Greek-owned cargo ship, *MINOAN PIONEER*, off the Omani coast near the strait's entrance.[28] Another Iranian outlet reported on August 4 that the *MINOAN PIONEER* had previously transited the Iranian route safely on July 29.[29] Commercially available shipping data confirmed that the Greek-owned, Liberian-flagged *MINOAN PIONEER* had docked at the Iranian port of Mahshahr in the northern Persian Gulf.[30] The vessel then loitered near Sohar, Oman, from July 30 to August 2 before proceeding towards Fujairah, the United Arab Emirates (UAE).[31] The vessel then turned off its automatic identification system transponder on August 3.[32] CENTCOM has not confirmed that it struck the *MINOAN PIONEER* specifically at the time of this writing.

Iranian Strike Campaign

Assessed Iranian War Aims:

- *Secure international recognition of Iranian control over the Strait of Hormuz*
- *Degrade the US ability and willingness to continue the war*
- *Restore deterrence vis-à-vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

See topline section.

Lebanon

The Lebanese Armed Forces (LAF) announced on August 4 that it seized a weapons shipment smuggled from Syria near Aarsal, Baalbek-Hermel Governorate, that was likely intended for Hezbollah.[33] The LAF stated that it seized at least a dozen Grad rockets.[34] Hezbollah has historically used Grad rockets to target Israel.[35] The LAF seizure coincides with recent Lebanese government initiatives to curb Hezbollah smuggling efforts. Lebanese media reported on July 27 that the LAF is implementing a “broad security plan” to close land-based smuggling routes and tunnels along the Lebanon-Syria border, including several routes in Hermel District, Baalbek-Hermel Governorate, which is a Hezbollah stronghold.[36] UK-based, Saudi-owned media reported on July 27 that Lebanon installed new scanners and security measures at Beirut Port, Rafic Hariri International Airport, and the Masnaa border crossing to curb Hezbollah weapons and money shipments.[37]

LAF efforts to disarm Hezbollah in the “pilot zones” in southern Lebanon will likely fail if the Lebanese government does not stipulate and ensure that military forces have authorization and the will to search private property to confiscate Hezbollah materiel. LAF sources told Saudi media on August 1 that the Lebanese judiciary has not yet authorized the LAF to search private homes and property pursuant to the government’s efforts to disarm Hezbollah.[38] The sources confirmed that LAF units have not searched for Hezbollah materiel on private property in the “pilot zones,” which include areas surrounding Zawtar el Gharbiyeh, Froun, and Ghandouriyeh in Nabatieh Governorate, as a result.[39] Lebanese judicial officials previously told Saudi media on July 22 that the Lebanese judiciary was considering several possible means to authorize the LAF to search private property and confiscate Hezbollah materiel, including search warrants that would apply to individual properties or municipalities as a whole.[40] Hezbollah frequently conceals its materiel in civilian homes and private property to prevent Lebanese authorities from seizing the group’s weapons and deter adversaries from striking assets in civilian-populated areas.[41] Legal restrictions preventing the LAF from searching and clearing Hezbollah materiel on private property preclude the LAF from fulfilling its obligation under the June 26 Trilateral Framework Agreement to completely disarm Hezbollah.[42] Lebanese government leaders must also ensure that LAF units operating in the “pilot zones” implement government directives to search private property. LAF personnel may avoid searching private property to avert confrontation with Hezbollah, absent strong enforcement efforts by LAF leaders and international partners, including the United States.[43]

The LAF’s limited progress in searching private property comes amid resumed US-brokered Israel-Lebanon talks in Rome from August 4 to 6.[44] Lebanese media reported on August 4 that the Israeli and Lebanese negotiating delegations discussed issues relevant to implementing and verifying LAF efforts to disarm Hezbollah in the pilot zones.[45]

Iraq

Unspecified security and political sources told Iraqi media on August 4 that the Iraqi federal government has begun taking measures to prevent Iranian-backed Iraqi militia attacks on neighboring countries.[46] The sources said that these measures include imposing “severe penalties” on security officials proven to have conducted attacks from their area of responsibility (AOR) and conducting “close surveillance” on Iraqi desert areas bordering Saudi Arabia and Jordan.[47] Iraqi Prime Minister Ali al Zaydi also ordered the formation of a “joint security committee” on August 1 to develop “deterrent measures” to prevent future militia attacks against nearby countries.[48] These security measures come after Saudi Arabia, Jordan, and Kuwait reportedly warned the Iraqi government that they

would strike Iranian-backed Iraqi militias in Iraq if the militias launch any new attacks against their countries, according to a senior Iraqi official speaking to US-funded Arabic-language media on July 31.[49] Nearby countries, including Saudi Arabia, had previously urged the Iraqi government to prevent Iranian-backed Iraqi militias from launching attacks on neighboring countries from Iraqi territory.[50] Iranian-backed Iraqi militias have conducted several attacks against nearby countries in recent weeks.[51]

These measures follow US and Saudi strikes on Iranian-backed Iraqi militia sites on July 28 in response to attacks on US interests in Iraq and Saudi oil infrastructure.[52] Zaydi reportedly postponed his visit to Saudi Arabia following the strikes, but will visit the country next week, according to an informed source speaking to Iraqi media on August 3.[53]

A member of Iranian-backed Iraqi militia Asaib Ahl al Haq's political party claimed on August 4 that Popular Mobilization Commission (PMC) Chairman Faleh al Fayyadh had prior knowledge of the US and Saudi strikes targeting Iranian-backed Iraqi militia sites on July 28, which is likely an attempt to create a political scandal that will result in Zaydi firing Fayyadh.[54] Unspecified political sources similarly told Iraqi media on August 3 that Zaydi had informed Fayyadh about the upcoming strikes.[55] The PMC chairman is roughly equivalent to a US military service chief (though he reports directly to the prime minister, not the defense minister) and controls the Popular Mobilization Forces (PMF), which is an Iraqi security service that includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[56] Only the Iraqi prime minister has the authority to fire the PMC chairman.[57] The US and Saudi strikes on July 28 killed at least 20 PMF members, which Asaib Ahl al Haq may use to pressure Zaydi to dismiss Fayyadh by accusing him of failing to evacuate PMF bases despite prior knowledge of the strikes.[58] Iraqi media reported on August 3 that some Shia Coordination Framework parties doubted the political sources' claims that Fayyadh had prior knowledge and viewed them as politically motivated, however.[59] Asaib Ahl al Haq has called for Fayyadh's removal from his position as PMC chairman since 2024.[60]

The United States reportedly made its release of nearly \$30 billion of Saddam Hussein-era Iraqi funds contingent on the Iraqi federal government's disarmament of Iranian-backed Iraqi militias.[61] An informed source told Iraqi Kurdish media on August 2 that the United States withheld funds expected during Zaydi's Washington visit and conditioned their release on Iraqi efforts to restrict arms to the state and permit greater US investment.[62] This report follows several others from Iraqi and regional media in recent months about US efforts to pressure the Iraqi federal government to disarm the Iraqi militias, including through conditioning aid to Zaydi's government.[63] The Iraqi government has set the end of September as the deadline for its disarmament campaign, coinciding with the planned US-led coalition withdrawal from Iraq.[64] Multiple Iraqi militias, including those closest ideologically to Iran and most kinetically active in recent months, continue to refuse to disarm.[65] Iraqi and regional media have also detailed the various ways the militias attempted to circumvent the government's campaign, including by handing over "scrap" missiles and inoperable drones.[66]

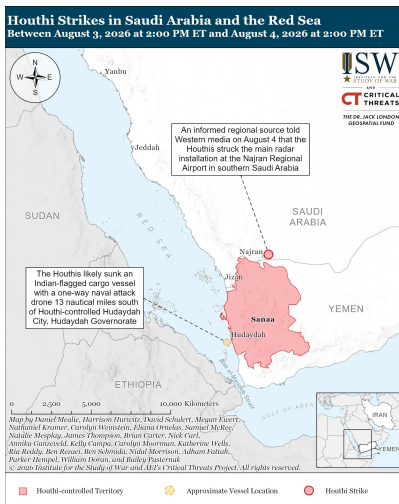
The PMF Ninewa Operations Command reportedly ordered the complete evacuation of its headquarters and formations in Ninewa Province in anticipation of further US strikes.[67] The PMF is an Iraqi state security service that includes multiple Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[68] A PMF source told Iraqi media on August 2 that the PMF Ninewa Operations Command's directive ordered the redeployment of PMF forces to alternative headquarters while leaving "minimal security" at headquarters throughout the province.[69] Ninewa Operations Command Commander Khadhir al Matrohi is affiliated with the Badr Organization.[70] US-Israeli strikes in March and April, as well as US-Saudi strikes on July 28, targeted PMF positions in Ninewa Province.[71] The US-Israeli combined force also reportedly struck the Ninewa Operations Command headquarters on March 19.[72] Multiple PMF units based in Ninewa Province, particularly the Kataib

Hezbollah and Harakat Hezbollah al Nujaba-affiliated 50th Brigade and the Badr-affiliated 30th Brigade, supported militia attacks on targets in Iraqi Kurdistan in March and April.[73] A Kurdistan Democratic Party member also said on July 28 that an unspecified PMF brigade in the Ninewa Plains has been conducting attacks on Iraqi Kurdistan, likely in reference to the 30th and 50th PMF brigades.[74]

Arabian Peninsula

The United States has reportedly urged Saudi Arabia not to retaliate against the Houthi blockade and attacks on Saudi-flagged vessels amid reported indirect Saudi-Houthi de-escalation talks.[75] Regional and Western diplomats told Bloomberg on August 4 that US officials have privately discouraged Saudi retaliatory strikes in response to Houthi attacks on Saudi shipping.[76] Saudi Arabia has not struck Houthi-controlled Yemeni territory since July 25, when Saudi-led coalition aircraft struck likely Houthi drone and missile launch sites in Jawf and Marib Governorates.[77] Sources familiar with the matter told Bloomberg on August 4 that Saudi Arabia has recently conducted indirect negotiations with the Houthis via Omani mediators in an attempt to deescalate Saudi-Houthi tensions.[78] The sources said that the Houthis have demanded that Saudi Arabia make unspecified economic concessions during the talks.[79] Houthi National Negotiating Delegation member Abdulmalik Alejri stated on August 4 that the Houthis expect Saudi Arabia to “seriously respond” to Houthi demands, including paying Houthi officials’ salaries and lifting the “blockade” on Yemeni ports and airports.[80] The Houthis have repeatedly demanded that Saudi Arabia pay Houthi civil servant salaries since 2018.[81] Saudi Arabia is reportedly continuing to plan for potential military operations against the Houthis should these negotiations fail.[82] Saudi Arabia is reportedly concerned that expanded conflict between the Houthis and the Saudi-led coalition could hurt Saudi’s oil industry and economy, however.[83] These concerns were one of the reasons that Saudi Arabia reached a ceasefire in 2022 with the Houthis. Saudi Arabia has increasingly relied on Yanbu and other Saudi Red Sea ports to export oil and circumvent Iran’s control over the Strait of Hormuz.[84] Saudi oil exports via the Red Sea have increased to 3.5 million barrels per day, up from 120,000 barrels per day before the current war, according to *the Economist* on July 30.[85]

The Houthi military spokesperson Yahya Sarea claimed that a Houthi drone struck a “sensitive target” at Najran Regional Airport, southern Saudi Arabia, on August 4.[86] An informed regional source told AFP on August 4 that the Houthis struck the Najran Regional Airport’s main radar installation, which has affected airport operations.[87] Commercially available flight data indicates that the airport suspended inbound and outbound flights on August 4.[88] Saudi officials have not confirmed the strike at the time of this writing, however. The Houthis claimed that the strikes were in response to recent Saudi “violations” of Yemeni airspace with drone overflights in the Saada and Hajjah governorates.[89] Sarea stated further Saudi “violations” would not go “unpunished.”[90] The Houthis previously shot down two Saudi drones over Houthi-controlled territory on July 26 and 28.[91]



The Houthis likely sank an Indian-flagged cargo vessel with a one-way naval attack drone near the Bab al Mandeb Strait. Indian Minister of Ports, Shipping, and Waterways Sarbananda Sonowal announced on August 4 that an unspecified projectile struck and sank the Indian-flagged MSV *FAIZE NOORE OLIYA* “near Yemeni waters.”[92] UK-based Saudi-owned media reported on August 4 that a water-borne improvised explosive device, possibly a one-way naval attack drone, struck the vessel 13 nautical miles south of Houthi-controlled Hudaydah City, Hudaydah Governorate.[93] The Houthis have utilized one-way naval attack drones to attack US Navy and civilian commercial vessels since 2024.[94] Yemeni military sources told Saudi media on August 3 that the IRGC helped the Houthis reinforce launch sites on high ground overlooking the Bab al Mandeb Strait and the Houthis’ main port at Hudaydah.[95]

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Iran Update Special Report, August 5, 2026



Ben Rezaei, William Doran, Bailey Pasternak, Nidal Morrison, Carolyn Moorman, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

Key Takeaways

1. The factional nature of Iranian decisionmaking is likely slowing Tehran's approval of the draft Iran-Oman agreement covering vessel traffic in the Strait of Hormuz. There are conflicting reports of whether the regime has finalized the draft agreement.
2. Iran is likely linking any lifting of restrictions on traffic through the strait to both US economic and strait-related concessions. Lifting restrictions on the strait without US concessions would weaken Iran's bargaining position in negotiations while leaving the US blockade, sanctions, and other economic pressure in place.

Toplines

The factional nature of Iranian decisionmaking is likely slowing Tehran's approval of the draft Iran-Oman agreement covering vessel traffic in the Strait of Hormuz. There are conflicting reports of whether the regime has finalized the draft agreement. Axios reported on August 4 that Iran's leadership approved the agreement.[1] Two unspecified regional officials told the Associated Press on August 5, however, that Supreme Leader Mojtaba Khamenei had not approved the agreement.[2] This round of negotiations — like the others before it — has reportedly taken place without the presence of the Islamic Revolutionary Guards Corps (IRGC).[3] A faction of anti-concessions Iranian leaders, likely from the IRGC and led by IRGC Commander Major General Ahmad Vahidi, are close to the supreme leader and have consistently won policy arguments since the war began. One of the few times the IRGC did not win this argument was when Iranian President Masoud Pezeshkian successfully convinced the supreme

leader to accept the Memorandum of Understanding (MoU) in June by offering his resignation as president. The repeated insistence of Iranian officials that the Iran-Oman talks only cover technical transit arrangements further indicates that the regime has not yet reached consensus on the agreement.[4]

This lack of consensus on the agreement likely reflects the regime's internal divisions over negotiations.[5] ISW-CTP assessed on July 28 that three groups are competing to shape Iran's negotiations policy: an anti-concessions faction likely led by Vahidi that supports talks but rejects any agreement that limits Iranian control over the strait; a pro-concessions faction that includes Iranian President Masoud Pezeshkian, Foreign Affairs Minister Abbas Araghchi, and Parliament Speaker Mohammad Bagher Ghalibaf and is more willing to compromise to reduce economic pressure; and the ultra-hardline Paydari (Stability) Front, which opposes negotiations with the United States altogether.[6]

All these factions agree that Iran must maintain a certain level of control over the strait; their differences are related to tactics, not strategic objectives.

The emerging Iran-Oman arrangement will reportedly give Iran a greater role in controlling traffic through the strait than Iran had before the war. Axios reported on August 4 that the agreement stipulates that inbound vessels will travel through Iranian waters, while outbound vessels will use a route through Omani waters "in coordination with Iran" for sixty days while mines are cleared from the recognized transit scheme.[7] Iranian Deputy Foreign Affairs Minister for Legal and International Affairs Kazem Gharibabadi described a broader Iranian role on August 5, however.[8] Gharibabadi stated that vessels would also travel through Iranian waters during part of their outbound passage before continuing through Omani waters.[9] Gharibabadi added that the new arrangement would replace both existing temporary routes, referring to the US-facilitated southern route through Omani waters and the route through Iranian waters that Iran has coerced vessels by force to use in recent months.[10] Gharibabadi's description therefore suggests that Iran is seeking more direct control over outbound traffic than what Axios described on August 4.[11] A regional source told Reuters on August 5 that the unspecified "parties" had already accepted some form of Iranian control over the strait but did not provide further detail.[12] Iran is likely seeking to convert the temporary leverage it gained by disrupting maritime traffic into a lasting role in managing the waterway, which would allow the Iranian regime to monitor vessel traffic, pressure adversaries, and threaten renewed disruption of the strait during future crises. ISW-CTP previously assessed that Iranian control of the strait is detrimental to global commercial interests because it enables Iran to selectively determine which vessels may pass through the strait and at what cost.[13]

Iran is likely linking any lifting of restrictions on traffic through the strait to both US economic and strait-related concessions. Lifting restrictions on the strait without US concessions would weaken Iran's bargaining position in negotiations while leaving the US blockade, sanctions, and other economic pressure in place. Unidentified Iranian sources told Iranian media on August 5 that Iran would not reopen the strait unless the United States ended its attacks on Iran, addressed the alleged US MoU "violations," met Iran's conditions, and provided guarantees that the United States military would not attack Iran.[14] Iran notably viewed any strait transit that crossed without its approval as a violation of the MoU, which suggests that Iran is seeking even more significant strait-related concessions. Iran likely calculates that restoring normal traffic through the strait before securing economic benefits and its concessions to its control of the strait would reduce the costs that the conflict imposes on the United States and regional states and thus weaken the US incentive to make concessions. The Financial Times reported on August 4 that the United States would lift its naval blockade and ease restrictions on Iranian oil exports if Iran agreed to reopen the strait, according to a person briefed on the recent talks.[15] Axios also reported on August 4 that the temporary Iran-Oman arrangement concerning the strait could facilitate renewed ceasefire and nuclear negotiations.[16] The regime likely views the strait agreement as an initial step as part of a broader and

more comprehensive agreement related to the strait and will not give up substantive leverage without a broader agreement.

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

- *Secure international recognition of Iranian control over the Strait of Hormuz*
- *Degrade the US ability and willingness to continue the war*
- *Restore deterrence vis-à-vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

Nothing significant to report.

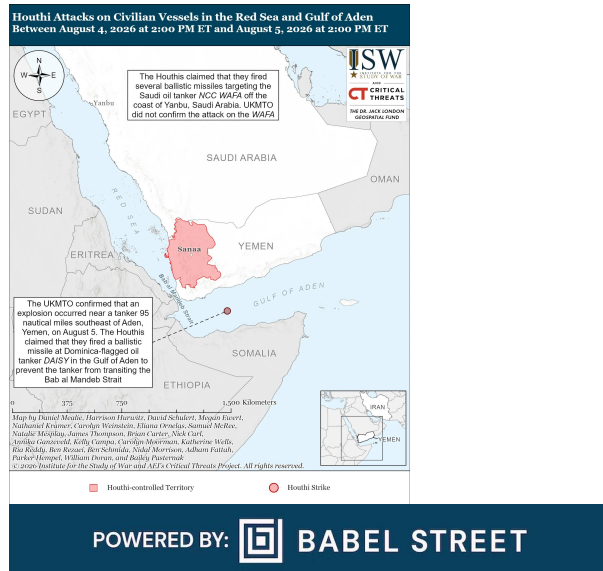
Lebanon

The Israel Defense Forces (IDF) issued an evacuation order ahead of conducting airstrikes in Mansouri, Tyre District, on August 5, after announcing that Hezbollah violated the ceasefire.[17] The IDF has not issued evacuation orders ahead of strikes in southern Lebanon since July 11.[18] The IDF did not provide details of the reported Hezbollah ceasefire violation.[19] Hezbollah-aligned Lebanese media reported on August 5 that an improvised explosive device killed two IDF soldiers operating in Majdal Zoun, Tyre District, which neighbors Mansouri, however.[20] Hezbollah has not claimed this attack at the time of this writing.

Iraq

Iraqi Prime Minister Ali al Zaydi's anti-corruption and militia disarmament efforts are reportedly deepening divisions within the Shia Coordination Framework. An Iraqi political source told Saudi media on August 5 that unspecified Iraqi officials who initially supported Zaydi's disarmament and anti-corruption initiatives have "begun to back down" in recent weeks.[21] The source claimed that some framework leaders have withdrawn support for Zaydi's efforts out of concern that Iraqi authorities

one ballistic missile targeting the Dominica-flagged, Saudi-operated *Daisy* oil tanker in the Gulf of Aden to prevent the vessel from transiting the Bab al Mandeb Strait.[37] UKMTO confirmed on August 5 that an unspecified tanker master reported hearing an explosion near the vessel in the Gulf of Aden.[38] These attacks follow a likely Houthi one-way naval drone attack against an Indian-flagged cargo tanker near the Bab al Mandeb Strait on August 4.[39] The Houthis have claimed several attacks on Saudi vessels since July 22 as part of their efforts to enforce a blockade on Saudi ports.[40]



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Iran Update Special Report, August 6, 2026



Benjamin Schmida, Adham Fattah, Nidal Morrison, Carolyn Moorman, Ben Rezaei, 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.

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

Key Takeaways

1. Iranian regime media claimed that the emerging Iran-Oman deal would enable Iran to maintain control of the Strait of Hormuz. Any agreement that grants Iran control over the strait would be detrimental to US and global commercial interests. Achieving international recognition of its control over the strait would enable Iran to use the strait as a deterrent against its adversaries in potential future conflicts.
2. Iran continues to use force to consolidate its control of the strait. United Kingdom Maritime Trade Operations (UKMTO) reported on August 5 that a vessel's crew heard two explosions while passing through Omani territorial waters.
3. Iran and its Axis of Resistance are likely attempting to deter the Syrian government from disrupting smuggling routes used to support Hezbollah.
4. Iran likely believes that continued Syrian government efforts to disrupt Hezbollah smuggling routes in Syria represent Syrian cooperation with Israel and the United States against Hezbollah when, in reality, Syria is exercising its sovereign right to secure its borders.
5. ISW-CTP is considering two possible courses of action for Iran in Syria:
 - **Most Likely Course of Action (MLCOA):** Iran uses clandestine cells in Syria to conduct spectacular attacks within Syria that force Syrian security forces to divert resources from border regions to respond to such attacks.
 - **Most Dangerous Course of Action (MDCOA):** A major Syrian counter-smuggling operation on the Lebanese border against Hezbollah triggers a coordinated Iranian-backed response involving clandestine cells, cross-border attacks, and possibly Iranian strikes to

deter further Syrian government action.

6. The Syrian government has deployed an increased number of forces to the Syria-Iraq border to support border security in response to Iranian and Axis of Resistance threats and activity.
7. The activities of Iran and the Axis of Resistance across the region, including their reported actions in Syria, are likely causing an increasing alignment of interests between different regional states.
8. The Houthis conducted missile and drone attacks against the Republic of Yemen Government (ROYG) military camps in Marib and Hadramawt governorates on August 6, possibly in response to ROYG ground movements near Houthi frontlines.

Toplines

Iranian regime media claimed that the emerging Iran-Oman deal would enable Iran to maintain control of the Strait of Hormuz. Any agreement that grants Iran control over the strait would be detrimental to US and global commercial interests. An informed source told Islamic Revolutionary Guards Corps (IRGC)-affiliated media on August 6 that the Iran-Oman deal stipulates that ships will enter the strait through Iranian territorial waters and exit through Omani territorial waters for a “certain period.”[1] Four industry sources similarly told Reuters on August 6 that the proposed deal between Iran and Oman would give Iran “control” over ships entering the Persian Gulf through the strait.[2] All ships would then, after this period, pass through a central route, with Iran managing ships’ entrances and Iran and Oman jointly managing ships’ exits.[3] The source added that the deal includes “insurance, fueling, and environmental fees,” which are effectively tolls.[4] The arrangement described by IRGC-affiliated media would enable the Iranian regime to retain control over both inbound and outbound traffic in the strait and earn revenue through charging tolls. This Iranian media report contradicts an August 6 Saudi media report in which a “senior source” claimed that the agreement does not include transit fees or service charges, however.[5]

Achieving international recognition of its control over the strait would enable Iran to use the strait as a deterrent against its adversaries in potential future conflicts. The Supreme Leader’s website newspaper, Voice of Iran, argued in an op-ed on August 5 that the regime views the strait as a central pillar of its security architecture rather than just bargaining leverage in negotiations with the United States.[6] This argument is consistent with ISW-CTP’s ongoing assessment that one of the regime’s strategic objectives is to secure long-term and permanent control over the strait.[7] Voice of Iran’s argument also comes after some “pragmatist” elements have questioned how much effort the regime should expend in enforcing its control over the strait. Former Foreign Affairs Minister Mohammad Javad Zarif, for example, argued on August 3 that Iran has a time-sensitive window of opportunity to capitalize on its control of the strait and argued that Iran should use the strait as leverage in negotiations to recover economically and avoid further US military action.[8]

Iran continues to use force to consolidate its control of the strait. United Kingdom Maritime Trade Operations (UKMTO) reported on August 5 that a vessel’s crew heard two explosions while passing through Omani territorial waters.[9] Iran has repeatedly targeted vessels in the strait using the Omani route because traffic through this route undermines Iranian efforts to assert full control over the strait.[10]

Iran and its Axis of Resistance are likely attempting to deter the Syrian government from disrupting smuggling routes used to support Hezbollah.[11] AUK-based Saudi-owned outlet reported on August 4 that numerous Iranian cells in Syria have prepared to launch attacks on Syrian government and civilian targets if the Syrian government decides to take unspecified action against Hezbollah.[12] Iran and its Axis partners in Iraq and Lebanon have consistently attempted to infiltrate

Syria with clandestine cells and recruit former pro-Assad fighters who remained in Syria after the fall of the Assad regime in 2024.[13] The Syrian government has thwarted several Iranian-supported smuggling attempts to equip Iranian cells in Syria as well as attempts to move Iranian-backed fighters across the Syria-Lebanon border in recent weeks.[14] Many Iraqi and Syrian fighters have already entered Lebanon to fight alongside Hezbollah.[15]

Iran likely believes that continued Syrian government efforts to disrupt Hezbollah smuggling routes in Syria represent Syrian cooperation with Israel and the United States against Hezbollah when, in reality, Syria is exercising its sovereign right to secure its borders. Iran likely views Syrian efforts against Hezbollah and weapons smuggling as threats to Iranian supply lines to Hezbollah and evidence of Syrian support for Israeli objectives, as reflected in Axis of Resistance media reports.[16] Iran and its partners and proxies have surely observed Western reports claiming that US President Donald Trump has repeatedly asked Syria to take action against Hezbollah, which would reinforce Iranian and Axis of Resistance perceptions. These Syrian government efforts instead address broader threats to Syrian sovereignty, including continued Axis of Resistance activity and smuggling in Syria after years of Iranian and Axis support for the Assad regime.[17] Iran has historically viewed Syria as a critical component to its ability to support Axis of Resistance operations throughout the region and has utilized Assad-era Syria to support Hezbollah with weapons and funding via Iraq.[18]

ISW-CTP is considering two possible courses of action for Iran in Syria:

- **Most Likely Course of Action (MLCOA): Iran uses clandestine cells in Syria to conduct spectacular attacks within Syria that force Syrian security forces to divert resources from border regions to respond to such attacks.** This would both divert resources away from the border regions (thereby making counter-smuggling efforts less effective) and could act as a deterrent against future border security efforts. Spectacular attacks would force already strained Syrian security forces to divert resources and personnel from monitoring active smuggling routes in border regions. Iran and the Axis could take advantage of these gaps in security to smuggle equipment, funds, and personnel across the Syrian border. The attacks would also create political challenges for Ahmad al Shara's government.
- **Most Dangerous Course of Action (MDCOA): A major Syrian counter-smuggling operation on the Lebanese border against Hezbollah triggers a coordinated Iranian-backed response involving clandestine cells, cross-border attacks, and possibly Iranian strikes to deter further Syrian government action.** A major Syrian counter-smuggling operation—perhaps against Hezbollah warehouses in Lebanon or an operation that kills a significant number of Hezbollah fighters—could create a volatile situation that triggers a wider Iranian and Axis response. Iranian cells could conduct a series of coordinated attacks against Syrian forces supported by Axis and possibly Iranian drone, rocket, and missile strikes in response to such an operation. Such a campaign may result in broader Hezbollah objectives beyond deterring the Syrian government once the campaign begins.

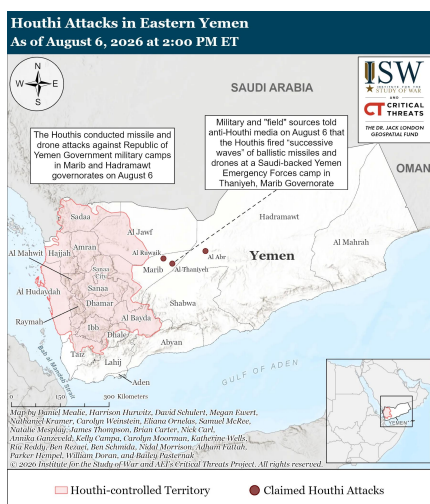
The Syrian government has deployed an increased number of forces to the Syria-Iraq border to support border security in response to Iranian and Axis of Resistance threats and activity.[19] The UK-based Saudi-owned outlet reported that Iranian-backed Iraqi militias and Hezbollah have reinforced positions along Syria's borders.[20] This deployment reportedly prompted the Syrian Defense Ministry to mobilize forces along the Iraq-Syria border.[21] The Syrian government reportedly informed the Iraqi and Lebanese governments that Iranian and Axis activity on Syria's borders threatens Syria's internal stability and warned both governments that Syrian forces would respond to any Hezbollah or Iraqi militia attacks.[22] The Iraqi Border Forces commander told Iraqi media on August 4 that the Syria-Iraq border situation is normal and Syria's border security measures are being coordinated with

Iraq.[23] This statement indicates that both Iraq and Syria interpret the Syrian deployment of forces to the border as part of a border security operation to prevent smuggling.

The activities of Iran and the Axis of Resistance across the region, including their reported actions in Syria, are likely causing an increasing alignment of interests between different regional states. Iran has increasingly threatened Syrian security both through the reported Iranian and Axis of Resistance cells and strikes on Syrian territory, including the Islamic Revolutionary Guards Corps (IRGC) strikes on the former US base in al Tanf, Syria, on July 17.[24] Iran and the Axis of Resistance have repeatedly struck multiple regional countries, including Saudi Arabia and the United Arab Emirates (UAE).[25] Syria has increased its coordination with Saudi Arabia and the UAE in recent weeks. Syrian President Ahmed al Shara held two phone calls with Saudi Crown Prince Mohammed bin Salman and UAE President Mohammed bin Zayed Nahyan on July 30 to discuss regional developments and condemn Iranian attacks on Saudi energy infrastructure, for example.[26] These activities have spurred increased cooperation between Arab states as they have become more frustrated with Iran.

The Houthis conducted missile and drone attacks against the Republic of Yemen Government (ROYG) military camps in Marib and Hadramawt governorates on August 6, possibly in response to ROYG ground movements near Houthi frontlines.[27] The Saudi-backed, ROYG-affiliated Yemen Emergency Forces confirmed that the Houthis attacked several of its camps and other ROYG-affiliated units on August 6.[28] The Houthi attacks killed at least 45 ROYG soldiers, according to unspecified sources speaking to Saudi media on August 6.[29] The Houthis claimed on August 6 that they conducted the attacks in response to a recent mobilization of ROYG and “Saudi” forces in Marib and Hadramawt governorates.[30] Anti-Houthi and Saudi media indicated in late July that ROYG forces were mobilizing in Marib Governorate. Anti-Houthi media reported on July 31 that ROYG security forces in Marib Governorate arrested several individuals for filming military movements on public roads.[31] Saudi-owned UK-based media also noted on July 25 that an unspecified actor conducted airstrikes on Houthi positions in Marib and al Jawf governorates, which coincided with ROYG military movements.[32] The immediate trigger for the recent Houthi attacks remains unclear, however. These attacks come after unspecified Yemeni sources told *The Guardian* on July 30 that Saudi Arabia is preparing for a naval and possible land offensive against the Houthis to end the group’s “chokehold” on Saudi Red Sea oil exports.[33]

The Houthi attacks on ROYG military positions also come after the Yemen Emergency Forces raided a Houthi-linked explosives manufacturing factory and seized Houthi military equipment in Hadramawt Governorate on August 3.[34] The Houthis may have also conducted their attacks on ROYG positions on August 6 to deter future ROYG actions targeting Houthi logistics and military procurement networks.



US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

- Secure international recognition of Iranian control over the Strait of Hormuz
- Degrade the US ability and willingness to continue the war
- Restore deterrence vis-à-vis the United States and its regional partners
- Divide the United States and Israel from the Arab states

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

The Islamic Revolutionary Guards Corps (IRGC) Ground Forces thwarted a reported planned militant attack in Sistan and Baluchistan Province.[35] The IRGC Ground Forces Quds Operational Base announced on August 6 that its forces dismantled an unspecified militant cell before it could conduct an attack in southern Sistan and Baluchistan Province.[36] IRGC forces reportedly ambushed the cell and killed two of its leaders during the operation.[37] Sistan and Baluchistan Province is a hotspot for anti-regime activity, including by anti-regime Baloch separatist groups that frequently attack Iranian security forces in the province.[38]

Lebanon

Nothing significant to report.

Iraq

Iranian-backed Iraqi militias have reportedly threatened to respond to the recent US-Saudi strikes on militia sites in Iraq if Saudi Arabia fails to meet the militias' demands, which include an official apology.[39] The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, previously said it would respond to the strikes after August 6.[40] An informed source said that the militias' demands include an official apology from Saudi Arabia, compensation for the victims' families and damage caused to Iraqi property, and limiting anti-militia discourse in Saudi media.[41] The United States and Saudi Arabia conducted joint strikes on militia positions in Iraq on July 28 in response to Iraqi militia attacks on Saudi oil infrastructure and US interests in Iraq and the region.[42] The Popular Mobilization Forces (PMF) said that the US-Saudi strikes killed at

least 20 PMF members and injured 30 members.[43] The PMF is an Iraqi state security service that includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[44]

The militias' decision to make their response contingent on Saudi Arabia meeting their demands, instead of immediately responding kinetically, may be in response to Iraqi federal government pressure on the militias to de-escalate. The militias could still resort to using force, however, particularly if Saudi Arabia does not agree to their demands. Informed sources told independent Iraqi Kurdish media on August 5 that the militias are “serious” about a military response to Saudi Arabia, but high-level government and political pressure is preventing them from responding militarily.[45] It is unclear what form of pressure the federal government has applied to the militias or whether the pressure will be sufficient to prevent the militias from responding kinetically. Previous Iraqi governments, including under former Prime Minister Mohammad Shia al Sudani, frequently attempted to halt the militias' kinetic activity in moments of high regional tension, most of the time to no avail.[46] Sudani constantly pressured the militias to stop attacks on US forces in Iraq and Syria between October 2023 and January 2024, but the militias only stopped these attacks after receiving direct orders from IRGC Quds Force Commander Brigadier General Esmail Ghaani to do so.[47]

The Iraqi militias continue to take security precautions due to concerns over further US strikes.[48] Security sources in Baghdad told Qatari-owned, UK-based media on August 6 that Iraqi militias evacuated their bases and established new positions following the US-Saudi airstrikes last week.[49] A senior security official also said that the militias transferred weapons, sensitive equipment, and commanders to the new positions after the strikes.[50] This report follows the PMF Ninewa Operations Command reportedly ordering the complete evacuation of its headquarters and formations in Ninewa Province on August 2 in anticipation of future strikes.[51]

Arabian Peninsula

The Saudi Defense Ministry appointed a commander for the Saudi-led multinational “maritime defense coalition” on August 6 to plan and coordinate coalition activities to protect international shipping from Houthi threats to the Bab al Mandeb Strait, the Red Sea, and the Gulf of Aden.^[52] Fourteen countries, including the ROYG, Kuwait, Bahrain, Qatar, Pakistan, Turkey, Egypt, Djibouti, Jordan, and Sudan, as well as other African and South Asian countries, joined the alliance on July 30.^[53] Saudi Arabia formed the coalition in response to the ongoing Houthi blockade on Saudi Arabia that began on July 20.^[54]

POWERED BY: **BABEL STREET**

Endnotes

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[2]

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Iran Update Special Report, August 7, 2026



Carolyn Moorman, Parker Hempel, Katherine Wells, William Doran, Ben Rezaei, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

Key Takeaways

1. The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, announced on August 7 that it would postpone its response to recent US-Saudi strikes on militia positions in Iraq due to mediation by Badr Organization head Hadi al Ameri.
2. The Iraqi militias were reportedly planning multiple “imminent” attacks on Saudi Arabia coordinated with the Islamic Revolutionary Guards Corps (IRGC) and the Houthis, according to a senior Saudi official speaking to Western and regional media. The Saudi official added that the attacks could target civilian and economic sites, including energy infrastructure, according to Saudi, US, and other regional reports.
3. The scale of the Iraqi federal government’s security precautions to thwart militia attacks on Saudi Arabia demonstrates the continued armament of Iraqi militias in the face of the government’s ongoing efforts to restrict arms to the state. The Iraqi federal government continues to insist that it will complete such efforts by its September 30 deadline, which corresponds with the planned withdrawal of US-led international coalition forces from Iraq.
4. Iran may have supported the Iraqi militias’ planned attack against Saudi infrastructure as part of Iran’s broader pressure campaign to coerce the United States and its allies into agreeing to further diplomatic concessions. An attack to the extent the militias reportedly planned, or even the threat of such an attack, would be consistent with Iran’s established pattern of using military escalation and regional instability to gain leverage.
5. The Houthis have increasingly coordinated with the IRGC and Iraqi militias to attack Saudi Arabia in recent weeks, likely as part of a multi-pronged effort to compel Saudi Arabia to accept Houthi demands. This increased Houthi coordination with the Iraqi militias comes amid continued Houthi

attacks against Saudi Arabia and the Saudi-backed Republic of Yemen Government (ROYG) targets.

Toplines

The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, announced on August 7 that it would postpone its response to recent US-Saudi strikes on militia positions in Iraq due to mediation by Badr Organization head Hadi al Ameri.[1] The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, said on June 29 that it would respond to recent US-Saudi strikes on militia positions in Iraq after August 6.[2] The US-Saudi strikes killed at least 20 members of the Iranian-backed Popular Mobilization Forces (PMF), which is an Iraqi state security service that includes many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[3] Multiple political and government security sources told Iraqi media on August 7 that Iraqi Prime Minister Ali al Zaydi and Ameri agreed to postpone the Iraqi security establishment's plan for "special operations" against militias suspected of involvement in attacks against Saudi Arabia, combined with a "widespread" force deployment and military readiness campaign, to allow for Iraqi federal government diplomacy.[4] Hadi al Ameri has often served as the mediator between the Iraqi federal government and the Iraqi militias due to his deep ties with Iran and Badr's greater integration into the Iraqi state compared to other Iraqi militias.[5] Iraqi media reported on August 7 that the Iraqi federal government raised the level of security preparedness and that unspecified Iraqi Security Forces (ISF) regiments moved from Anbar, Salah al Din, and Ninewa provinces to Baghdad Province in response to Iraqi intelligence indicating the militias planned to attack Saudi Arabia within the next 48 hours.[6] The militias store and distribute weapons within Baghdad Province.[7] The Iraqi prime minister also ordered the ISF to inspect all checkpoints and apprehend any vehicle or driver carrying illegal materials, weapons, or explosives.[8] Iran has smuggled weapons to its Iraqi partners for decades.[9] An unidentified Iraqi security source told Saudi media on August 7 that the scale of the deployments is "unprecedented." [10] Part of the Iraqi source's intent is likely to suggest to Saudi Arabia that Iraq is taking Saudi Arabia's security concerns seriously; ISW-CTP can only corroborate a few deployments near Baghdad.[11] Zaydi and Ameri's agreement ended the enhanced security precautions, according to Iraqi media, which would presumably improve the Islamic Resistance in Iraq's freedom of movement.[12]

Zaydi and Ameri's agreement causing the Islamic Resistance in Iraq to pause its attack plans follows an August 5 Iraqi media report in which informed sources said that the Iraqi militias had already decided to make their response contingent on Saudi Arabia meeting militia demands.[13] The reported militia demands included an official apology from Saudi Arabia, compensation for the victims' families and damage caused to Iraqi property, and limiting anti-militia discourse in Iraqi media.[14] ISW-CTP noted on August 6 that the militias could still resort to using force at any time, particularly if Saudi Arabia does not agree to their demands.[15]

The Iraqi militias were reportedly planning multiple "imminent" attacks on Saudi Arabia coordinated with the Islamic Revolutionary Guards Corps (IRGC) and the Houthis, according to a senior Saudi official speaking to Western and regional media.[16] The Saudi official added that the attacks could target civilian and economic sites, including energy infrastructure, according to Saudi, US, and other regional reports.[17] An Iraqi government source told anti-regime media on August 7 that the militias were also planning to attack Kuwait, Jordan, and Syria.[18] Multiple nearby countries have pressured the Iraqi federal government to stop militia attacks on their territories in recent weeks.[19] UK-based, Qatari media also reported on August 7 that unspecified intelligence demonstrated that Kataib Hezbollah and Harakat Hezbollah al Nujaba planned to attack Saudi Arabia.[20] These militias have attacked many regional countries recently and are some of the closest Iraqi militias to Iran ideologically.[21] The IRGC has played a direct role supporting militia activity in Iraq in recent months,

per a Reuters report on June 19 detailing that the IRGC directly supported Iraqi militia cells in their attacks on the Gulf states hosting US forces between late April and mid-May.[22] The recent US-Saudi strikes on Iraqi militia positions in Iraq also killed multiple IRGC officers.[23]

The scale of the Iraqi federal government's security precautions to thwart militia attacks on Saudi Arabia demonstrates the continued armament of the Iraqi militias in the face of the government's ongoing efforts to restrict arms to the state. The Iraqi federal government continues to insist that it will complete such efforts by its September 30 deadline, which corresponds with the planned withdrawal of US-led international coalition forces from Iraq.[24] A Shia Coordination Framework source told Iraqi media on August 7 that the framework, which includes Iranian-backed political parties, considers the September 30 deadline "flexible." [25] Saudi media also reported on August 5 that some framework members have begun to assert conditions and reservations concerning militia disarmament amid regional tensions and claimed threats to Iraqi internal security.[26] Multiple Iraqi militias, especially Kataib Hezbollah, Harakat Hezbollah al Nujaba, and Kataib Sayyid al Shuhada, continue to refuse to disarm and will likely continue to use a myriad of excuses to remain armed.[27] Some Iraqi militias are also attempting to circumvent the disarmament process, including by handing over inoperable weapons to the government.[28] The federal government also lacks accurate information on the militias and their arms due to the covert nature of the groups, including those within the PMF.

Iran may have supported the Iraqi militias' planned attack against Saudi infrastructure as part of Iran's broader pressure campaign to coerce the United States and its allies into agreeing to further diplomatic concessions. An attack to the extent the militias reportedly planned, or even the threat of such an attack, would be consistent with Iran's established pattern of using military escalation and regional instability to gain leverage.[29] Reports of the planned attack come as Iranian decisionmakers reportedly want further economic concessions under the Iran-Oman Strait of Hormuz agreement.[30] Regional mediators told the *Wall Street Journal (WSJ)* on August 6 that the IRGC is trying to extract further concessions from the United States and its allies under the Iran-Oman Strait of Hormuz agreement.[31] The agreement appears to be based on the US-Qatari proposed traffic management scheme under which inbound traffic would transit through Iranian waters, while outbound traffic would pass through Omani waters, according to mediators speaking to *WSJ* in recent days.[32] *WSJ* described Iran's preferred concessions as more explicit references to Iran's role in managing traffic in the strait, charging transit fees, and "assurances" that the United States will lift its naval blockade on Iranian ports and sanctions on Iranian oil sales.[33]

The mediators, in their mention of the IRGC seeking more US concessions, are likely referring to the political faction in Iran that is attempting to extract more concessions from the United States while making fewer concessions in return.[34] ISW-CTP has referred to this group as the "anti-concessions" faction and assesses it consists of IRGC Commander Major General Ahmad Vahidi and many of those around him.[35] The mediators confirmed that the IRGC's response to the latest draft of the Iran-Oman agreement is holding up talks.[36] A mediator told an Axios reporter on August 7 that the Iranian Supreme National Security Council, which is dominated by Vahidi's anti-concessions faction, is reviewing the agreement.[37]

It remains unclear whether the agreement that Iranian negotiators — Parliament Speaker Mohammad Bagher Ghalibaf and Foreign Affairs Minister Abbas Araghchi — sent to Iranian decisionmakers for approval includes transit fees or proposes any further economic relief for Iran. US officials and mediators previously stated that the proposal did not involve transit fees.[38] Ghalibaf and Araghchi reportedly supported some form of the agreement that they viewed as an acknowledgment of Iranian control over the strait.[39] Reports on the status of the agreement come amid the United States continuing its economic campaign against Iran.[40] The US Treasury imposed further sanctions on the regime's shadow

banking network on August 7 to restrict the Iranian regime's ability to generate revenue that it could use to reconstitute.[41] Iranian Central Bank Governor Abdolnasser Hemmati stated that these August 7 sanctions contradict US Treasury Secretary Scott Bessent's statements about Iran reaching a deal on the Strait of Hormuz.[42] Hemmati's statement indicates that the regime continues to tie sanctions relief and the lifting of the blockade as conditions to a settlement over the strait.

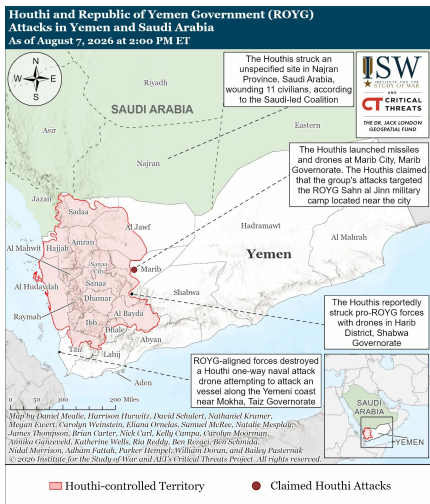
Low-level Iranian regime officials and media meanwhile continue to claim that Iran is only negotiating with Oman, and not the United States, over management of the strait.[43] Regime officials and media may be continuing to voice this narrative to reassure Iran's domestic audience and the regime's anti-negotiation camp that Iran is not conceding to the United States, however.[44]

The Houthis have increasingly coordinated with the IRGC and Iraqi militias to attack Saudi Arabia in recent weeks, likely as part of a multi-pronged effort to compel Saudi Arabia to accept Houthi demands. Western and regional media reported on August 7 that Houthis planned "imminent" coordinated strikes with the Iraqi militias on Saudi targets, including energy infrastructure, according to US, Saudi, and other regional reports.[45] Two regional sources also told Reuters on July 30 that Saudi Arabia and unspecified regional partners assess that the Houthis attacked Saudi Arabia on July 27 from Iraqi territory in coordination with the Iraqi militias and under IRGC supervision.[46] US-Saudi airstrikes, in response to the attacks on Saudi Arabia, reportedly killed a senior Houthi member on July 29, according to an independent Yemeni journalist.[47] The Houthis also reportedly established a new headquarters in a Kataib Hezbollah stronghold south of Baghdad to coordinate with the militias.[48]

This increased Houthi coordination with the Iraqi militias comes amid continued Houthi attacks against Saudi Arabia and the Saudi-backed Republic of Yemen Government (ROYG) targets.[49] The Houthis attacked an unspecified target in Najran Province in southern Saudi Arabia and wounded 11 civilians in the attack.[50] The Houthis previously struck the Najran Regional Airport with a drone on August 4.[51] The Houthis also struck ROYG-affiliated military positions in Yemen on August 7.[52] The Houthis attacked the Sahn al Jinn military camp using ballistic missiles and drones on August 7, but ROYG-affiliated media and an independent journalist said that at least 20 ballistic missiles and multiple drones struck Marib City and killed at least two people.[53] The military camp is close to the city, and it is unclear if the casualties were civilians or military. The Houthis also reportedly struck ROYG-affiliated units in Shabwa Governorate on August 7.[54]

The Houthis are continuing to attack ships to prevent them from entering Saudi ports as part of their so-called "blockade" of Saudi ports. ROYG state media and an independent Yemeni journalist reported that ROYG-affiliated forces destroyed a Houthi one-way naval attack drone attempting to strike an unspecified vessel near Mokha, Taiz Governorate, on August 7.[55] The Houthis likely sunk an Indian cargo vessel with a one-way naval attack drone on August 4.[56] The Houthis have claimed multiple attacks against Saudi-owned or operated civilian vessels in recent days to compel commercial vessels to comply with the group's blockade of Saudi ports.[57]

Senior Houthi officials stated on August 7 that the Houthis will continue to sustain their naval blockade and strike Saudi and Saudi-affiliated targets until Saudi Arabia accepts Houthi demands, including the lifting of the Saudi "blockade" on shipping and aid to Houthi-controlled Yemeni territory, paying Houthi civil servant salaries, and allowing Iranian flights to land at Houthi airports.[58] Houthi officials, including Houthi military spokesperson Yahya Sarea and Houthi Supreme Political Council President Mahdi Mashaat, stated that the Houthis will continue to enforce their blockade on Saudi Arabia and attack Saudi-affiliated forces that threaten the Houthis until the Houthis achieve their objectives.[59]



Saudi Arabia, Turkey, and Pakistan are expanding defense cooperation in response to shared regional threats, including threats from Iran and Iranian-backed actors.[60] These agreements reflect a broader regional effort to strengthen coordination against common threats, mostly but not exclusively emanating from Iran. Saudi Arabia, Turkey, and Pakistan signed a joint defense agreement on August 7 that includes a collective defense provision for “mutual support only for defense.”[61] Saudi Arabia and Pakistan previously signed a mutual defense agreement in September 2025, and Pakistan later deployed 8,000 troops, a fighter squadron, and an air defense system to Saudi Arabia under that pact.[62] Saudi Arabia also announced a proposed 14-country maritime defense coalition in July 2026 to protect shipping in the Red Sea, Bab el Mandeb, and Gulf of Aden.[63] The new arrangement reflects a broader regional trend in which states are building partnerships and coalitions to protect themselves and their interests from persistent security threats.[64] Syria has also increased coordination with Saudi Arabia and the United Arab Emirates (UAE) amid shared concerns about Iranian and the Axis of Resistance’s activity.[65] These arrangements will create long-term strategic challenges for Iran by strengthening coordination among regional states that increasingly view Iranian and Iranian-backed activity as a common threat even if these agreements remain limited in scope.

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

- *Secure international recognition of Iranian control over the Strait of Hormuz*
- *Degrade the US ability and willingness to continue the war*
- *Restore deterrence vis-à -vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Lebanese officials will reportedly convene on August 10 to discuss redeveloping pipeline and overland transit projects to export Iraqi oil through Lebanon.[66] These projects are unlikely to create a near-term alternative to export routes through the Strait of Hormuz and are liable to security threats within Syria, however. Lebanese media reported on August 7 that unspecified officials scheduled a near-future meeting to discuss developing a pipeline that would extend from Iraq to Lebanon.[67] Saudi media reported on August 7 that Lebanese Prime Minister Nawaf Salam will convene a Lebanese ministerial meeting on August 10 to discuss establishing an overland tanker truck route from Iraq through Syria to Lebanon's primary oil refinery in Tripoli, on the Mediterranean coast.[68] It is unclear whether Iraqi officials will join Salam's ministerial meeting, however. Salam previously discussed Iraqi fuel exports to Lebanon and prospects of reviving the long-defunct Kirkuk-Tripoli oil pipeline with Iraqi Prime Minister Ali al Zaydi in Baghdad on July 26.[69] Iraq has discussed several proposals with the United States and regional partners in recent weeks to develop alternative routes to the Strait of Hormuz for Iraqi oil exports, amid Iranian efforts to control traffic in the strait and the Persian Gulf.[70] Salam's plans to discuss only logistical prerequisites, including repairs to the Tripoli refinery and derelict crossings on the Lebanon-Syria border, in the August 10 meeting indicate that Iraqi-Lebanese energy corridor plans will require significant time, resources, and preparation to successfully implement.[71] These extensive requirements suggest that Iraq and Lebanon will be unable to fully implement an alternative oil export route to the Strait of Hormuz in the near term.

The Islamic State of Iraq and al Sham (ISIS) would likely conduct attacks on overland transportation projects — including both trucks and pipelines — within Syrian territory. ISIS fighters frequently attack tanker trucks and oil infrastructure in northern and eastern Syria as part of the group's "economic war" against the Syrian state and other anti-ISIS actors.[72] ISIS attacked an Iraqi tanker truck in northern Syria's Aleppo Province on June 16, for example.[73] ISIS has abundant incentives to attack Iraqi oil tanker trucks and other oil infrastructure because of the group's long-standing conflict with the Iraqi government and the prospects of both economic gains from stealing oil and damage to Iraq's heavily oil-dependent economy.[74] Iraq and Lebanon must be able to rely on the Syrian government to suppress ISIS activity to ensure the safe and reliable transit of Iraqi oil through Syrian territory. ISIS's growing militant activity in Syria's major urban centers may limit the Syrian government's ability to ensure safe passage for Iraqi oil convoys to Lebanon, however.[75]

Iran could, in the future, leverage members of the Axis of Resistance, including the Iraqi militias and Hezbollah, to conduct clandestine attacks on Iraqi-Lebanese oil infrastructure projects if Iran or one or more of its partners feels doing so would deter an adversary from taking a specific action. Iran has a strategic interest in maintaining positive relations with the Iraqi government because Iran is heavily economically dependent on Iraq, which could deter direct Iranian attacks on Iraqi oil projects.[76] The IRGC could direct its Axis of Resistance proxies, or front groups under their control, to disrupt future Iraqi-

Lebanese oil infrastructure and transportation projects within Syria to express discontent with Iraqi or Lebanese government activities that challenge Iran's interests.

Lebanese and Israeli representatives developed a tentative “shortlist” of countries whose forces could verify Hezbollah disarmament efforts in southern Lebanon during recent negotiations in Rome, according to Reuters on August 7.[77] A Lebanese official told Reuters that the candidate countries could deploy ground forces to southern Lebanon to confirm that the Lebanese Armed Forces (LAF) have successfully disarmed Hezbollah in “pilot zones” agreed on by Israel, Lebanon, and the United States under the June 26 Trilateral Framework Agreement.[78] The official did not disclose which countries Israel and Lebanon have agreed on as potential verifying agents but clarified that the United States will issue final approval for one or more countries on the “shortlist.”[79] Israeli and Lebanese negotiators previously disagreed on mechanisms to monitor LAF activity in the “pilot zones” before the latest round of negotiations in Rome between August 4 and 6.[80] Israeli, Lebanese, and US officials have planned to resume direct negotiations on September 1.[81]

The LAF announced on August 7 that an Israeli drone struck an LAF bulldozer in Mansouri, Tyre District.[82] The LAF said that the attack mildly wounded one Lebanese soldier.[83] The Israel Defense Forces (IDF) has not commented on the incident at the time of this writing.

Iraq

An unspecified source told Saudi media on August 7 that a Shia Coordination Framework delegation arrived in Tehran to discuss the Iraqi federal government's disarmament campaign.[84] It is unclear which framework members comprise the delegation, but the framework includes multiple Iranian-backed parties. The source added to Saudi media that the framework is forming a committee to negotiate disarmament with the Iraqi militias.[85]

Arabian Peninsula

See topline section.



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Iran Update Special Report

August 8, 2026



Ben Rezaei, Ria Reddy, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Note: *ISW-CTP has revised its update structure due to the resumption of war between the United States and Iran. Iran is currently engaged in an information effort to frame its attacks on US bases and regional states as retaliatory and defensive. Iran is not merely responding to US strikes on Iran, however, but is engaged in proactive military operations to achieve discrete objectives. The revised update structure reflects some of these key objectives.*

Key Takeaways

1. Iran is trying to secure additional US concessions before “reopening” the Strait of Hormuz while using both messaging and force to signal its continued intent to control maritime traffic through the strait. These demands suggest that hardline elements within the regime, including Islamic Revolutionary Guards Corps Commander Major General Ahmad Vahidi and his inner circle, are shaping Iran’s negotiating position and seek to secure the benefits of an agreement without relinquishing Iran’s leverage over the strait.
2. The US naval blockade is imposing high economic costs on Iran, which may strengthen arguments within the regime for reaching an agreement, but Iran’s current maximalist position on the strait suggests that economic costs have not yet given pro-negotiation officials sufficient leverage to secure broader concessions from the dominating faction within the regime.

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Iran is trying to secure additional US concessions before “reopening” the Strait of Hormuz while using both messaging and force to signal its continued intent to control maritime traffic through the strait. Iranian Foreign Affairs Minister Abbas Araghchi stated on August 8 that Iran and Oman are close to an agreement on a temporary transit route through the strait but emphasized that “reopening” the strait remains “subject to other conditions.”[1] Iranian Supreme National Security Council (SNSC) Secretary Mohammad Bagher Zolghadr separately conditioned the strait’s “reopening” on six demands for the United States, including lifting the naval blockade and sanctions, withdrawing

military forces from around Iran, paying war reparations, releasing frozen Iranian assets, and ceasing attacks on Iran's regional allies.[2] The SNSC is Iran's highest national security and foreign policy decision-making body.[3] The *Wall Street Journal* similarly reported on August 7 that the Islamic Revolutionary Guards Corps (IRGC) has pressured Iranian negotiators to demand an end to the blockade, oil sanctions relief, and other concessions.[4] These demands suggest that hardline elements within the regime, including IRGC Commander Major General Ahmad Vahidi and his inner circle, are shaping Iran's negotiating position. CTP-ISW continues to assess that this faction dominates Iranian decision-making and seeks to secure the benefits of an agreement without relinquishing Iran's leverage over the strait.[5]

Iran has simultaneously continued to use force to coerce actors to accept Iranian control over the strait. The Emirati Foreign Affairs Ministry reported on August 8 that an Iranian missile struck an oil tanker affiliated with the United Arab Emirates (UAE)'s state oil company in the strait but caused no casualties.[6] Iran's repeated attacks on commercial shipping in the strait demonstrate that Iran continues to use force to try to establish control over the strait amid ongoing negotiations.

The US naval blockade is imposing high costs on Iran's oil exports and broader economy, but this pressure has not yet caused Iranian decisionmakers to soften their position on the strait.

The *Financial Times*, citing shipping and satellite data providers, reported on August 7 that Iranian tankers have not loaded any crude oil at Kharg Island for at least a week.[7] The blockade has also prevented tankers from returning to Iran after unloading in Asia, which will likely limit Iran's oil storage capacity and may force Iran to curb crude production.^[8] The *Financial Times* added that Iran's oil storage levels have not increased recently, which may suggest Iran has already reduced its crude production as its ability to export or store additional oil becomes constrained.[9] Iran previously repurposed older tankers and empty vessels for temporary offshore oil storage to alleviate some of the mounting pressure on onshore facilities during the US naval blockade from April to mid-June 2026.[10] Iranian President Masoud Pezeshkian acknowledged on August 8 that the blockade has also blocked Iran's previous import routes and has forced Iran to use more difficult and costly alternatives.[11] Increased economic pressure may strengthen arguments within the regime for reaching an agreement, but Iran's current maximalist position on the strait suggests that economic costs have not yet given pro-negotiation officials sufficient leverage to secure broader concessions from the dominating faction within the regime.[12]

US and Partner Military Operations

Iranian Strike Campaign

Assessed Iranian War Aims:

- *Secure international recognition of Iranian control over the Strait of Hormuz*
- *Degrade the US ability and willingness to continue the war*
- *Restore deterrence vis-à-vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

Nothing significant to report.

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Endnotes

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