

Iran Update, August 31, 2026



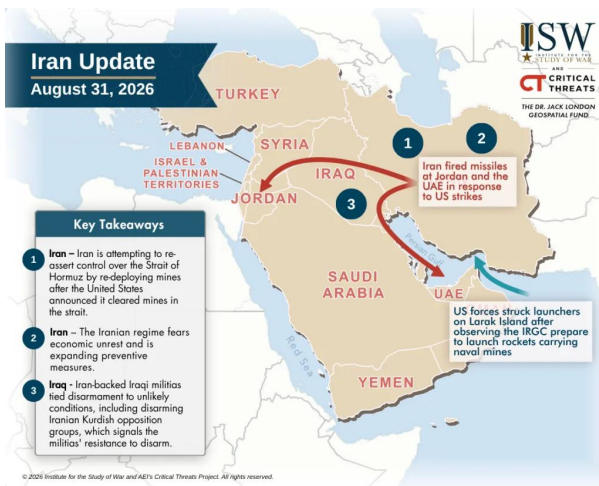
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Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events from the preceding weekend, collected after ISW-CTP's 2:00 PM ET Friday data cutoff. ISW-CTP may publish special updates on Saturdays and Sundays if events warrant, however.

Key Takeaways

1. The Iranian regime is attempting to re-assert its control over the Strait of Hormuz by deploying mines and re-cultivating international perceptions of the threat to vessels in the strait after US Central Command (CENTCOM) announced that it had cleared mines in the strait. CENTCOM announced that US forces struck two Iranian rocket launchers on Larak Island after observing the IRGC prepare to launch mines into the strait.
2. Iranian forces' suboptimal methods to intimidate ships in the strait — including missile launchers instead of fast attack craft (FAC) to lay mines and FAC for detecting vessels — suggest that Iranian forces are adapting under military constraints that are limiting Iran's ongoing ability to threaten vessels.
3. The Iranian regime is demonstrating increasing concern that worsening economic conditions could trigger renewed anti-regime protests and is expanding preventive measures to deter and suppress possible unrest.
4. Iran's deteriorating economy is generating potential triggers for renewed unrest, but the regime has limited ability to address these problems, especially under the US economic campaign to isolate Iran.
5. Some Iranian-backed Iraqi militias are conditioning their disarmament on several conditions that the militias likely recognize the Iraqi federal government will not be able to implement, which underscores the militias' intentions to resist disarmament.
6. Iran likely pressured these militias to condition their disarmament on the Iraqi federal government expelling Iranian Kurdish opposition groups to further incentivize the Iraqi government to crack down on these groups. The Iranian regime perceives Iraqi Kurdistan as a base for Israel and Kurdish opposition groups to cooperate and launch attacks against Iran.

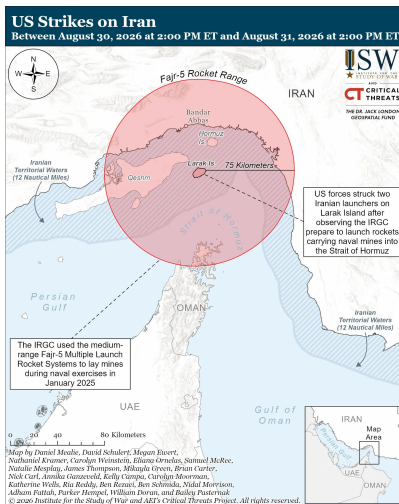


Toplines

The Iranian regime is attempting to re-assert its control over the Strait of Hormuz by deploying mines and re-cultivating international perceptions about the threat to vessels in the strait after US Central Command (CENTCOM) announced that it had cleared mines in the strait. CENTCOM Commander Admiral Brad Cooper announced on August 27 that US forces successfully removed the mines that Iran previously laid in the Strait of Hormuz's internationally recognized traffic separation scheme.[1] Cooper's announcement undermines the regime's ability to use the threat of mines as an element of Iran's strategy to disrupt traffic through the strait since the regime effectively "closed" the strait in March 2026.[2] The Islamic Revolutionary Guards Corps (IRGC) has pointed to the threat of mines that it placed along the internationally recognized traffic separation scheme as a means to force vessels into Iranian territorial waters and therefore make them liable to Iranian regulations and service fees. The elimination of one of Iran's mechanisms for sustaining the perception that the strait is "closed" directly challenges Iran's assertion that it controls the strait and risks hindering Iran's ability to secure sovereignty over the strait, which is one of Iran's war aims.[3]

Iran has responded to US CENTCOM's announcement by taking actions that are intended to intimidate global shipping firms and reinforce Iranian "control." Regime media has attempted to intimidate global shipping firms by repeatedly denying CENTCOM's assertions that US forces have demined the strait.[4] The IRGC Navy claimed on August 31 that two sea mines stopped a supertanker attempting to transit the Strait of Hormuz through what the IRGC deemed the "illegal route." [5] CENTCOM denied that any ships have struck Iranian mines in the strait.[6]

Iran also attempted to re-deploy mines in the strait on August 30. CENTCOM announced that US forces struck two Iranian rocket launchers on Larak Island after observing the IRGC prepare to launch mines into the strait.[7] These strikes are the first US strikes in Iran since July 29.[8] This instance is also the first observed Iranian attempt in this war to deploy mines through a shore-based delivery method. The IRGC Navy exhibited a launcher that fired mobile mines from Fajr 5 rockets from the Iranian coast into the sea during a naval exercise in January 2025.[9] Fajr 5 rockets have a range of approximately 75 kilometers.[10]

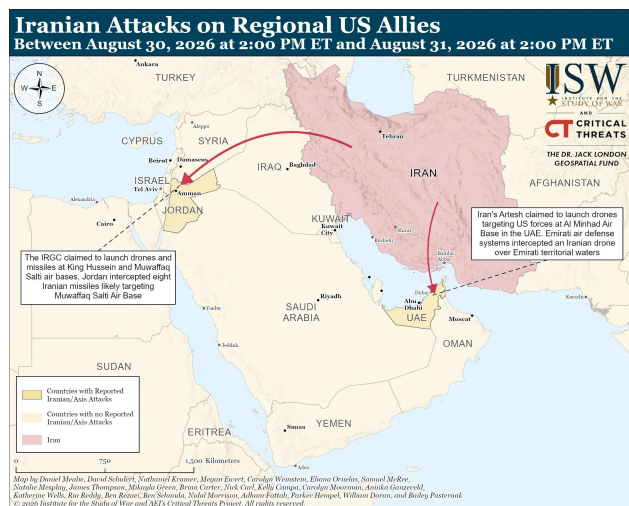


Iranian forces’ suboptimal methods to intimidate ships in the strait suggest that Iranian forces are adapting under military constraints that are limiting Iran’s ability to threaten vessels. Iran’s use of missile launchers instead of fast attack craft (FAC) to lay mines in the strait on August 30 suggests that military constraints are forcing Iran to adopt less optimal means to lay mines. Iran has historically deployed FAC to mine the strait, which is a more precise method than firing mine-loaded projectiles.[11] The use of a shore-based delivery system may suggest that Iranian forces assess that deploying FAC for mine-laying operations exposes those vessels to unacceptable risk, especially after CENTCOM’s July 2026 airstrikes that destroyed more than 60 IRGC FAC near and in the Strait of Hormuz. CENTCOM also targeted other Iranian capabilities that supported Iran’s disruptive activities in the strait, including coastal radar sites, anti-ship missile capabilities, drone launch sites, and command-and-control networks.[12]

Iran is also reportedly using FAC to surveil ships in the strait rather than through coastal radar systems. The head of a risk advisory firm stated on August 30 that the IRGC is using FAC to identify ships transiting the strait by physically approaching and reading the names of ships.[13] Such an approach suggests that the IRGC Navy may be unable to rely upon traditional coastal radar systems due to the degradation of these systems. Unspecified US officials told Axios on August 19 that CENTCOM’s campaign to degrade Iran’s radar and maritime surveillance systems has diminished visibility of the traffic in the southern transit route and that Iran’s ability to monitor traffic has been limited to “a few radars” and some FAC.[14] These reports also suggest that Iran may have developed a rudimentary and suboptimal find, fix, and finish alternative targeting cycle using its radar and missile assets during the respite from US airstrikes since July 2026. Such a targeting cycle requires forces to detect and identify a specific threat (find), track and pinpoint its exact location in time and space to prevent escape (fix), and deploy military options to capture, neutralize, or destroy the target (finish).[15]

The Iranian regime attacked US bases in the region and claimed attacks on other bases in order to deter the United States and its allies from undermining Iranian control of the strait and isolating Iran economically. Iran responded to CENTCOM’s strikes on Larak Island by launching ballistic missiles and drones at the King Hussein and Muwaffaq Salti air bases in Jordan on August 30.[16] The Jordanian army intercepted eight missiles. US officials stated that nearly all incoming munitions were intercepted and that there were no significant impacts on the bases.[17] Regime media reported on August 31 that Iranian forces launched dozens of drones on US troops at Al Minhad Air Base in the United Arab Emirates (UAE) and claimed multiple direct hits.[18] The UAE intercepted a drone over Emirati territorial waters but denied that any Iranian missiles struck the UAE.[19] The UAE announced on August 18 that it would halt all trade and financial transactions with Iran.[20]

Iran's attacks on the US bases are the latest iteration of Iran's established response calculus in which it responds to any US efforts to restore maritime navigation by targeting US bases.[21] Regime-affiliated media outlet Nour News argued on August 31 that Iran's recent strikes against Jordan demonstrate the limits of US reliance on geographic distance for force protection, which is part of the regime's broader efforts to isolate the United States from its partners in the region.[22] The same outlet separately argued on August 31 that Iran was not trying to defeat the United States militarily but rather raise the costs of the conflict enough to cause US officials to concede.[23] This argument is consistent with Iran's attempts to deter the United States from undermining Iran's efforts in the strait by claiming multiple successful attacks on US bases.[24]



The Iranian regime is demonstrating increasing concern that worsening economic conditions could trigger renewed anti-regime protests and is expanding preventive measures to deter and suppress possible unrest. Regime officials have warned that economic grievances could fuel unrest, expanded internal security preparations, and increased pressure on suspected protest networks in recent weeks.[25] Judiciary Chief Gholam Hossein Mohseni Ejei warned on August 31 that the Iranian judiciary, Law Enforcement Command (LEC), intelligence services, and security forces are at their “highest level of readiness” and that the judiciary will act “more decisively than ever” against individuals who attempt to instigate unrest or undermine security.[26] Ejei also claimed that officials broadly agree on the need to strengthen security and decisively confront “anti-security elements” from within Iran.[27] Ejei’s remarks are an indicator that the regime increasingly views renewed protests as a plausible internal security threat and is trying to deter citizens frustrated with Iran’s weak economy from mobilizing into broader anti-regime movements. Ejei similarly instructed prosecutors amid electricity and gas shortages in December 2024 ahead of economically motivated protests to coordinate directly with intelligence, security, and LEC agencies to take measures to strengthen public security and act with “greater firmness” against efforts to create insecurity.[28]

Iran’s deteriorating economy is generating potential triggers for renewed unrest, but the regime has limited ability to address these problems, especially under the US economic campaign to isolate Iran.[29] Iranian foreign trade has fallen by 35 percent and annual inflation has risen to 66 percent as of August 26, according to Iranian government officials and Western media.[30] Iranian parliamentarians criticized Central Bank Governor Abdol Nasser Hemmati on August 31 over the instability of Iran’s exchange rate.[31] Iran also faces an acute gasoline shortage as a result of the US blockade on Iranian ports that has prevented Iran from importing refined oil and exporting non-refined oil. Some regime elements are calling for the regime to increase gas prices.[32] Iranian officials are likely reticent to significantly raise the cost of fuel because a gasoline price increase triggered nationwide protests in 2019.[33] The Winter 2025-2026 protests similarly began amid the Iranian rial’s collapse and worsening economic

conditions.[34] The regime's concerns about potential unrest do not necessarily mean that senior decisionmakers will change course in order to relieve economic pressure, however. ISW-CTP assessed on August 21 that IRGC Commander Major General Ahmad Vahidi and other anti-concession officials may tolerate greater domestic instability because they may calculate that the regime can suppress renewed protests as it has previously done in the December 2025 to January 2026 protests.[35]

Some Iranian-backed Iraqi militias are conditioning their disarmament on several conditions that the militias likely recognize the Iraqi federal government will not be able to implement, which underscores the militias' intentions to resist disarmament. Iranian-backed Iraqi militia Kataib Sayyid al Shuhada published 10 conditions for its disarmament on August 29 that include the full withdrawal of US forces from Iraq, the "liberation" of Iraqi political and economic decision-making from US "hegemony," the withdrawal of Turkish forces from northern Iraq, and the expulsion of anti-Iranian regime Kurdish groups from Iraqi Kurdistan.[36] Iranian-backed Badr Organization head Hadi al Ameri reiterated these demands at a memorial ceremony for Shia cleric Mohammad Baqir al Hakim on August 30.[37] The Islamic Resistance in Iraq, which is a loose coalition of Iranian-backed Iraqi militias that includes Kataib Sayyid al Shuhada, released a similar list of preconditions on August 17.[38] It is unclear if the Badr Organization is also conditioning its disarmament on the Iraqi federal government meeting these demands or if Ameri is merely echoing Kataib Sayyid al Shuhada's demands. Ameri has played a key role in supporting the Iraqi government's disarmament efforts in recent months.[39][40]

Iran likely pressured these militias to condition their disarmament on the Iraqi federal government expelling Iranian Kurdish opposition groups to further incentivize the Iraqi government to crack down on these groups. The Iranian regime perceives anti-regime Kurdish groups based in Iraqi Kurdistan to be a direct security threat. Some Iranian-backed Iraqi militias have previously echoed Iran's view of the Iraqi Kurdistan region as a base for Israel and Kurdish opposition groups to cooperate and launch attacks against Iran but have not previously demanded the expulsion of these groups until August 29.[41] The inclusion of this demand comes just over a week after several senior Iranian officials, including Iranian Parliament Speaker Mohammad Bagher Ghalibaf, met with Iraqi officials in Baghdad on August 19 and 20. Iranian officials likely discussed Iranian Kurdish groups in Iraq with their Iraqi counterparts during the meetings, particularly given that the Iranian government has urged the Iraqi federal government to take stronger action against anti-regime Kurdish groups in Iraqi Kurdistan in recent months.[42] An unnamed Kurdish politician and an Iraqi official told UK-based, Qatari-owned media on May 26 that senior Iranian officials, including IRGC Quds Force Commander Brigadier General Esmail Ghaani, demanded that the Iraqi federal government remove all Iranian Kurdish opposition groups from Iraqi territory.[43] Iran may calculate that the Iraqi government is more willing to crack down and disarm anti-regime Iranian Kurdish groups as part of a disarmament deal with Iranian-backed Iraqi militias.

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

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

See topline section.

Lebanon

Nothing significant to report.

Iraq

An informed source told Iraqi media on August 30 that the Iraqi government will soon refer separate draft laws concerning the Popular Mobilization Forces (PMF) to Parliament for approval after adjusting one of the laws to address US concerns about Iranian influence in the PMF.[44] The informed source told Iraqi media the United States did not object to any clauses in the PMF Retirement and Service draft law but opposed parts of the PMF structure draft law, in reference to the Popular Mobilization Authority draft law.[45] It is unclear what is included in the current draft law, but a previous iteration of the Popular Mobilization Authority draft law would have strengthened Iran's influence within the Iraqi security establishment by formalizing key PMF structures. The federal government reportedly responded to the US concerns by removing two paragraphs in the draft law related to the creation of a staff college for PMF members and the establishment of the Muhandis Company, which is a US-sanctioned PMF-controlled commercial entity.[46] Former Prime Minister Mohammad Shia al Sudani withdrew a previous iteration of the draft law from parliament in August 2025, due to reported US pressure.[47] Sudani also withdrew the PMF Services and Retirement draft law from Parliament in March 2025 amid back-and-forth by Iranian-backed Iraqi actors attempting to use provisions of the draft law to fire Popular Mobilization Commission Chairman Faleh al Fayyadh, Sudani's then political ally.[48] That PMF Services and Retirement draft law would have forced several PMF leaders, including Fayyadh, to retire by setting the retirement age at 60.[49] The source speaking to Iraqi media on August 30 added that the two draft laws represent the near-final versions to be presented to parliament, but the federal government could amend the laws at any time until this occurs.[50] Iranian-backed actors have repeatedly stated their interest in passing laws that strengthen the PMF and thus Iranian influence in Iraqi security decision making. Iraqi militia Kataib Sayyid al Shuhada included the passage of the unspecified PMF law in its conditions in exchange for disarmament on August 29.[51]

Iraqi media reporting about the referral of these PMF laws contradicts more recent reporting detailing Iraqi Prime Minister Ali al Zaydi's efforts to conduct major structural reform of the PMF, however.[52] A senior Iraqi government source told UK-based, Qatari-owned media on August 25 that unidentified actors—likely referring to Zaydi government officials — made several amendments to a

PMF-affiliated "draft law" that aim to limit the PMF's operational powers.[53] The source is likely referring to the Popular Mobilization Authority draft law. The source added that the amended draft law includes provisions that would force several PMF leaders to retire, which signals that the PMF Service and Retirement draft law could have been combined into this draft law.[54] This report and an August 12 report from the same outlet both noted that Zaydi is considering changes to PMF leadership that include appointing Iraqi Army and Counter Terrorism Service officers to PMF leadership positions.[55] ISW-CTP continues to assess that Iraqi militias are unlikely to support this amended legislation as reported as it could fulfill US objectives regarding militia disarmament. The Iraqi Parliament is also unlikely to approve the amended law. Parliamentarians affiliated with Iraqi militias that control PMF brigades sit on the committee responsible for reviewing and approving the draft law before it reaches a parliamentary vote.[56]

Iranian-backed Iraqi militia Kataib Hezbollah's Security Chief Abu Mujahed al Asaf released a statement on August 29 that confirmed Kataib Hezbollah's intentions to continue its control over its stronghold in Jurf al Sakhr, south of Baghdad.[57] Asaf said that Kataib Hezbollah will never abandon Jurf al Sakhr and invited Sunni Sovereignty Alliance head Khamis al Khanjar to visit the area.[58] Kataib Hezbollah has refused to allow the Iraqi federal government to exercise sovereignty over Jurf al Sakhr for over a decade and has used the area to store weapons as well as launch attacks against US and foreign targets in Iraq and the region.[59] Kataib Hezbollah's capture of the area from Islamic State of Iraq and al Sham (ISIS) control in late 2014 also displaced Jurf al Sakhar's predominately Sunni residents.[60] Sunni Iraqis, including Sunni politicians, often complain about this forced displacement.[61] Khanjar responded to Asaf's statement on August 29 by denying that any group "owned" Jurf al Sakhr and rejecting Kataib Hezbollah's ability to "grant permission" to enter the area.[62] Asaf's mention of Jurf al Sakhr follows Zaydi's apparent reversal of reported plans for Iraqi security forces to retake the area following intense pressure by Iran and Iranian-backed Iraqi actors.[63]

Asaf also claimed on August 29 that Popular Mobilization Commission (PMC) Chairman Faleh al Fayyadh warned Kataib Hezbollah's leadership in advance of US-Saudi strikes on militia positions on July 28 and enabled Kataib Hezbollah to take unspecified precautionary measures.[64] Fayyadh is responsible for ensuring that the PMF, and the Iranian-backed Iraqi militias that compose it, answer to the Iraqi federal government.[65] Asaf said that Fayyadh allowed him to release this statement.[66] US-Saudi strikes on July 28 killed at least 28 PMF members.[67] Kataib Sayyid al Shuhada Spokesperson Kazim al Fartousi separately denied on August 31 that Fayyadh warned the group before the strikes.[68] Iranian-backed Iraqi actors, especially those aligned with Asaib Ahl al Haq and its parliamentary bloc, continue to claim that Fayyadh had prior knowledge of the US-Saudi strikes, likely in an effort to create a political scandal that could result in Zaydi firing Fayyadh.[69] Asaib Ahl al Haq has called for Fayyadh's removal from his position as PMC Chairman since 2024 for unclear reasons.[70] The PMF has continued to reject that Fayyadh had advanced warning.[71]

Arabian Peninsula

The Republic of Yemen Government (ROYG)-affiliated, Saudi-backed National Resistance Forces seized a shipment of drone components intended for the Houthis from a vessel reportedly traveling from Djibouti to the Houthi-controlled Hudaydah Port on August 24.[72] The shipment contained Chinese-produced, industrial grade wireless modems with a range of up to 12 kilometers in addition to dozens of drone engines, transmitters, and other components.[73] ROYG authorities previously seized multiple caches of electronic components that could be used for first-person view (FPV) drone production at Yemeni ports and land crossings on August 13.[74] The Houthis have historically smuggled goods through Djiboutian ports and utilized Djiboutian agents to bypass the UN

Verification and Inspection Mechanism, which is based in Djibouti and designed to combat Houthi smuggling operations in the Red Sea.[75]

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Endnotes

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Iran Update, September 1, 2026



Katherine Wells, Adham Fattah, Nidal Morrison, Benjamin Schmida, Brian Carter

Analyst Notes: Data Cutoff: 3:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events from the preceding weekend, collected after ISW-CTP's 2:00 PM ET Friday data cutoff. ISW-CTP may publish special updates on Saturdays and Sundays if events warrant, however.

Key Takeaways

1. Iran struck US and allied bases and assets in the region on September 1 in retaliation for US strikes on Iranian military targets, including radars, on the same day. The US Central Command (CENTCOM) strikes appeared to focus on assets that Iran uses to sense ships to strike.
2. US strikes on radars will likely impose operational constraints on Iranian forces attempting to disrupt shipping in the strait. ISW-CTP previously assessed on August 31 that Iran was facing operational constraints on its ability to disrupt shipping in the strait.
3. The Iranian attacks on August 30 and 31 indicate that Iran has some capacity to disrupt shipping through the southern route to exit the Strait of Hormuz. The three Iranian attacks on August 30 and 31 do not necessarily imply that Iran faces no constraints, only that it overcame them in those three instances. ISW-CTP will continue to monitor the rate of strikes and the tactical choices involved in each strike to evaluate whether Iran is facing tactical constraints as it attempts to disrupt shipping.
4. Iranian President Masoud Pezeshkian may have sought military and economic aid for Iran during meetings with world leaders at the Shanghai Cooperation Organization (SCO) summit in Bishkek, Kyrgyzstan, on August 31 and September 1.

Toplines

Iran struck US and allied bases and assets in the region on September 1 in retaliation for US strikes on Iranian military targets, including radars, on the same day.[1] These radars could have been used to sense and then strike oil tankers in the Persian Gulf. The US Central Command (CENTCOM) said that the September 1 strikes against the radars “followed” Iranian attacks on three oil tankers and US forces and bases in the region.[2] ISW-CTP will provide further details on Iran’s September 1 retaliatory attacks on September 2. Senior Iranian military commanders threatened a

military response on September 1 before the attacks, with the Islamic Revolutionary Guard Corps (IRGC) spokesperson specifically threatening Bahrain and Kuwait.[3]

The CENTCOM strikes appeared to focus on assets that Iran uses to sense ships to strike. US President Donald Trump told Fox News on September 1 that US forces struck an unspecified number of Iranian radars that Iran was attempting to rebuild.[4] Iran uses these radars to detect vessels transiting the strait.[5] CENTCOM noted that this followed the IRGC's "attempted attacks" on commercial shipping in the strait, thus explicitly linking the attacks on shipping and the strikes.[6]

The Iranian attacks on August 30 and 31 indicate that Iran has some capacity to disrupt shipping through the southern route to exit the Strait of Hormuz. Multiple maritime intelligence and observer organizations reported that an unknown projectile struck an oil tanker and that three projectiles hit a very large crude carrier (VLCC), the *Senegal Prosperity*, on August 30 and 31, respectively.[7] Another shipping intelligence firm told Reuters that Iran hit a second VLCC at the same time it hit *Senegal Prosperity* on August 31.[8] Iranian regime media reported that this second vessel was using the southern route through the strait.[9] These attacks demonstrate that Iran retains some capacity to use its higher-end systems to target shipping through the Strait of Hormuz. Iran has been attacking vessels that use this route because it is an alternative route to the Iranian-controlled route in the northern part of the strait, undermining Iran's perceived control over the strait.[10] US forces have been escorting vessels out of the Persian Gulf through this route, which has restored shipping to half of pre-war levels, according to US officials speaking to Axios on August 28.[11]



US strikes on radars will likely impose operational constraints on Iranian forces attempting to disrupt shipping in the strait. ISW-CTP previously assessed on August 31 that Iran was facing operational constraints on its ability to disrupt shipping in the strait.[12] Iran is having to adapt its operations to re-establish and re-cultivate international perceptions of Iranian control over the strait.[13] A risk advisory firm director noted on August 31 that the IRGC has been using fast attack craft (FAC) to help detect vessels going through the strait by visual recognition, for example, which is an extremely suboptimal method to find, fix, and finish a target at sea compared to radars and other purpose-built sensors.[14] That Iran must resort to these suboptimal techniques suggests that it is facing constraints.[15] CENTCOM's August 30 strikes on mine-launching systems suggest that the IRGC Navy is increasingly relying on rocket launchers to deploy mines in the strait, which is also suboptimal compared to laying mines from a vessel.[16] The three attacks on August 30 and 31 do not necessarily imply that Iran faces no constraints, only that it overcame them in those three instances. ISW-CTP will continue to monitor the rate of strikes and the tactical choices involved in each strike to evaluate whether Iran is facing tactical constraints as it attempts to disrupt shipping.

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

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Iranian President Masoud Pezeshkian may have sought military and economic aid for Iran during meetings with world leaders at the Shanghai Cooperation Organization (SCO) summit in Bishkek, Kyrgyzstan, on August 31 and September 1. The SCO, which Iran joined in 2023 and sees as a mechanism to undermine the US-led international order, is a multilateral forum that was established by Eurasian countries, including China and Russia, to coordinate on political, military, and economic issues.[17] Pezeshkian and his delegation met with several world leaders, including Russian President Vladimir Putin, People's Republic of China (PRC) President Xi Jinping, and Indian Prime Minister Narendra Modi.[18] Both official and unofficial readouts of these meetings are typically vague and do not necessarily reflect the content of the conversations.[19]

Pezeshkian may have spoken to these leaders about ways to fortify Iran's military and economic options because of US-Israeli strikes on Iranian military assets during the war and the US economic campaign against Iran. Russia, for example, is a key Iranian partner and delivers military and non-military goods to Iran via the Caspian Sea.[20] Informed sources told anti-regime media on August 26 that the US blockade of Iranian ports, Ukrainian strikes on Russian refining infrastructure, and disruptions to the Caspian Sea supply route between Iran and Russia have restricted Iran's refined gasoline imports, likely exacerbating Iran's fuel crisis.[21] Significant disruptions to this key trade route for Iran may incentivize Pezeshkian to seek alternative ways to obtain those Russian goods in his conversations with Putin. The PRC accounts for about 90 percent of Iran's oil exports.[22] The US naval blockade on Iranian ports and Iran's control of the Strait of Hormuz have disrupted Iran's ability to export oil and thus incentivize Pezeshkian to find alternative ways to export oil to Iran's largest buyer.[23]

Lebanon

Nothing significant to report.

Iraq

The Iraqi Central Criminal Court sentenced Kataib Hezbollah member Amir Rahim Jabbar Lazem to 15 years in prison on August 30 for his involvement in kidnapping US journalist Shelly Kittleson in Baghdad in March 2026.[24] The Central Criminal Court operates under the Supreme Judicial Council, which also nominates the Central Criminal Court's head.[25] An Iraqi Interior Ministry official told UK-based, Qatari-owned media on August 31 that Lazem is a member of a Kataib Hezbollah "special operations unit." [26] The official added that the other Kataib Hezbollah members involved in Kittleson's kidnapping remain at large.[27] Kataib Hezbollah released Kittleson on April 7 in exchange for the Iraqi federal government's release of several imprisoned Kataib Hezbollah members.[28] The Central Criminal Court also sentenced two Kataib Hezbollah fighters to 15 years in prison on August 31 for a March 2026 rocket attack on the US Embassy in Baghdad, according to a leaked court document circulated by Iraqi media.[29] Likely Iranian-backed Iraqi militias fired rockets at the US Embassy in Baghdad on March 7.[30]

Iranian-backed Iraqi militia Asaib Ahl al Haq seeks to appoint the Popular Mobilization Commission (PMC) chairman, according to a senior framework leader who spoke to Iraqi media on September 1.[31] The PMC Chairman oversees the Popular Mobilization Forces (PMF), which is an Iraqi security service comprised of many Iranian-backed Iraqi militias that report to Iran instead of the prime minister.[32] This report comes as Asaib Ahl al Haq and its allies continue to accuse PMC Chairman Faleh al Fayyadh of prior knowledge of US-Saudi strikes on PMF targets, likely to create a political scandal that generates US pressure on Prime Minister Ali al Zaydi to fire Fayyadh.[33] It is unclear, however, whether Asaib Ahl al Haq's accusations are accurate. Asaib Ahl al Haq's reported aim to control the PMC Chairman position helps explain why the militia has called for Fayyadh's removal since 2024.[34]

Arabian Peninsula

Nothing significant to report.

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Iran Update, September 2, 2026



Ben Rezaei, Adham Fattah, Nidal Morrison, William Doran, 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 updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events from the preceding weekend, collected after ISW-CTP's 2:00 PM ET Friday data cutoff. ISW-CTP may publish special updates on Saturdays and Sundays if events warrant, however.

Key Takeaways

1. US efforts to restore freedom of navigation appear to be having some success in challenging Iran's ability to enforce control over the Strait of Hormuz. Increased commercial vessel transit levels indicate that Iran is having difficulty in preventing some commercial vessels from using the southern route. Iran may seek alternative ways to demonstrate or restore control over the strait as the United States challenges Iran's ability to threaten vessels.
2. The roughly 50 percent reported failure rate of Iranian ballistic missiles fired at Jordan on September 1 may reflect the degradation of Iran's longer-range missile capabilities.
3. The *Financial Times* (FT) reported on September 1 that Russia has been covertly helping Iran develop advanced cruise missile technology since around November 2023. Iran's development and operationalization of this technology would likely improve its ability to threaten US land and naval assets in the region. Developing supersonic cruise missile technology takes substantial time, and it is currently unclear how far along Iran is in developing this technology.
4. Iran is likely pursuing two separate but related lines of effort to advance Iranian objectives in Iraq amid Iraqi government efforts to disarm Iranian-backed Iraqi militias. Iran reportedly pushed unspecified Iraqi government actors and Iranian-backed Iraqi militias to reach a settlement in which the militias would "discreetly" retain their weapons by storing them either in Popular Mobilization Forces (PMF)-controlled depots or in the militias' own depots under the condition that they would not use them without PMF approval. Iran is also reportedly pursuing a plan to build a new cadre of smaller, more ideological militias over which Iran would have strong control.

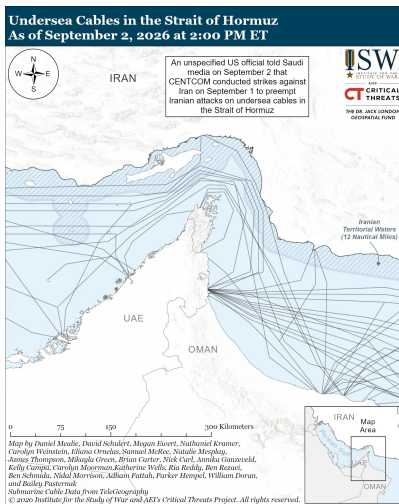
Toplines

US efforts to restore freedom of navigation appear to be having some success in challenging Iran's ability to enforce control over the Strait of Hormuz. US officials told Axios on September 2

that approximately 40 vessels carrying millions of barrels of oil transited the Strait of Hormuz on September 1.[1] US Energy Secretary Chris Wright also confirmed that oil tankers transported over 17 million barrels of oil through the strait on August 31, which is the highest volume of oil exports through the strait since the start of the US-Israel-Iran War.[2] This amount is close to pre-war levels, which averaged 21.6 million barrels per day in the fourth quarter of 2025.[3] The US Energy Information Administration estimated on August 10 that an average of 4.9 million barrels per day transited the strait in the second quarter of 2026, highlighting how oil export volumes through the strait have improved compared to earlier in the war.[4] These transit levels indicate that Iran is having difficulty in preventing some commercial vessels from using the southern route. There have recently been several indicators that Iranian forces are facing operational constraints. The Islamic Revolutionary Guards Corps (IRGC) recently attempted to use shore-based rocket launchers instead of fast attack craft (FAC) to deploy mines and has reportedly used FAC to physically identify vessels because Iran retains only a few functioning radars covering the southern route.[5] These less optimal methods suggest that US strikes have degraded some of Iran's maritime surveillance and mine-laying capabilities.[6] The IRGC's repeated false claims that vessels are striking naval mines in the strait likely similarly reflect an effort to preserve the perception that the southern route remains unsafe.[7] US Central Command (CENTCOM) previously reported on August 27 that US forces cleared all naval mines in the strait.[8]

Iran is trying to reconstitute military capabilities to threaten shipping in the strait. US President Donald Trump stated on September 1 that Iran had nearly rebuilt some of its radar systems before the United States struck them again on September 1.[9] The United States has also targeted Iranian coastal radar systems in previous rounds of strikes, including in June.[10] CENTCOM confirmed that its September 1 strikes targeted Iranian air defense sites, radar systems, maritime assets and facilities, mine-laying capabilities, and communications sites.[11] Iran appears committed to restoring the surveillance and maritime capabilities required to enforce its control over the strait despite repeated US strikes. Iran will likely continue to attempt to reconstitute these capabilities because Iran does not appear willing to relinquish control of the strait, which remains a core Iranian objective.

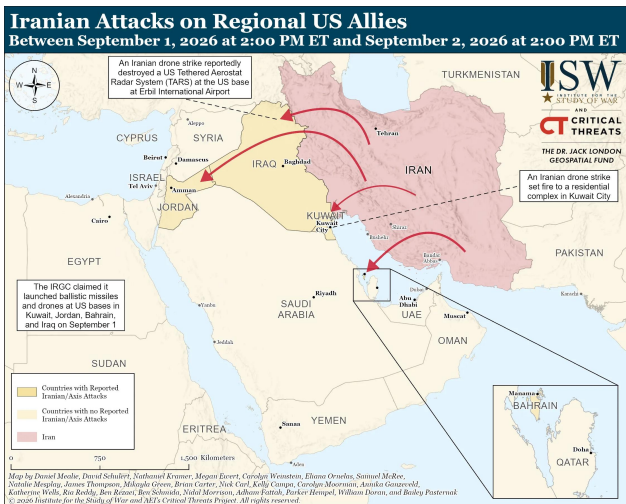
Iran may seek alternative ways to demonstrate or restore control over the strait as the United States challenges Iran's ability to threaten vessels. An unspecified US source told Saudi-based Al Arabiya on September 2 that CENTCOM's September 1 strikes sought to preempt Iranian attacks on undersea communications cables in the strait.[12] This report, if accurate, could indicate that Iran is considering expanding its coercive activity in the strait beyond attacks on vessels to fixed undersea infrastructure. IRGC-affiliated outlets have previously discussed using undersea cables as another source of leverage.[13] IRGC-affiliated Fars News and Tasnim News Agency argued in May that Iran should assert sovereignty over fiber-optic cables transiting the strait and require foreign operators to obtain permits and pay fees, for example.[14] *The Wall Street Journal (WSJ)* separately reported on August 16 that the IRGC had developed plans for "further escalation," including plans to sabotage undersea internet cables.[15] These reports suggest that Iran is considering new tools to preserve the perception that it still controls the strait as it faces constraints in its ability to threaten shipping. It is unclear, however, whether Iran possesses the technical capability to damage undersea cables effectively.



Iran likely seeks to use attacks on regional countries and messaging to their populations to pressure these states to reduce military cooperation with the United States. The IRGC claimed on September 2 that it conducted combined missile and drone attacks targeting US bases in Kuwait, Jordan, Bahrain, and Iraq.[16] US officials told Axios on September 1 that US air defenses intercepted two Iranian drones targeting a US base in Erbil, Iraqi Kurdistan.[17] Iran has repeatedly claimed that the presence of US forces imposes a security cost on host countries and continues to try to generate public pressure on regional states to distance themselves from the United States.[18] The IRGC directly addressed the Kuwaiti public on September 2 after claiming a missile and drone attack on Ali al Salem Air Base.[19] The IRGC stated that the attack was intended to help Kuwait “cleanse” its territory of US forces.[20] IRGC Political Affairs Deputy Brigadier General Yadollah Javani separately called on regional countries on September 2 to “expel the Americans” and warned that Iran would respond to attacks launched from countries that host US forces.[21] These IRGC statements suggest that Iran is trying to turn regional opposition to US basing into a source of pressure on the United States. The IRGC previously released a statement in July thanking the Jordanian people for allegedly providing Iran with information that aided Iran’s attacks on US bases in Jordan and called on Jordanians to demand the removal of US forces.[22]

This IRGC effort is consistent with broader Iranian attempts to raise the military and political costs of continued US involvement in the war on the United States. Voice of Iran, which has historically been affiliated with the Supreme Leader’s office, argued on September 1 that prolonged disruption in the strait would raise oil prices, inflation, and other economic pressure in the United States and increase political pressure on President Trump ahead of the midterm elections in November 2026.[23]

The roughly 50 percent reported failure rate of Iranian ballistic missiles fired at Jordan may reflect the degradation of Iran’s longer-range missile capabilities. US officials told Axios on September 1 that Iran fired approximately 25 ballistic missiles at Jordan on September 1, but that only about half reached Jordanian airspace.[24] Jordanian air defenses intercepted 10 missiles, and three others landed in open areas.[25] The reported failure rate could indicate that Iran used older, less advanced missiles or newer, potentially hastily produced missiles with lower reliability in the attack. Iran experienced a similarly high failure rate during its April 2024 True Promise I attack on Israel.[26] About 50 percent of the missiles that Iran launched at Israel at the time either failed to launch or crashed before reaching their targets.[27] Although the exact mid-flight failure rate of Iranian missiles in later attacks is unclear, some reports have estimated that roughly 10 percent of Iranian missiles failed during True Promise II in October 2024.[28] The similar failure rates between Iran’s True Promise I attack and its September 1 attack may therefore indicate the degradation of Iran’s longer-range missile capabilities.



FT reported on September 1 that Russia has been covertly helping Iran develop advanced cruise missile technology since around November 2023.[29] Iran’s development and operationalization of this technology would likely improve its ability to threaten US land and naval assets in the region. FT reported, citing leaked Russian correspondence, travel records, and military patents, that Russian state defense firms signed a contract with Iran’s Defense Ministry in November 2023 to develop Iran’s cruise missile propulsion technology.[30] Russian defense firm NPO Mashinostroyeniya has sent cruise missile experts to Iran in recent years to help Iran develop ramjet propulsion systems, which enable cruise missiles to fly at supersonic speeds and thereby bypass modern air defense systems more easily.[31] Iranian cruise missiles employ turbojet and turbofan engines and have not been very effective in conflicts with the United States and Israel over the past two years.[32] Iran launched around 30 cruise missiles at Israel in April 2024, but Israel was able to shoot down most of the missiles outside of Israeli airspace, for example.[33] Iran likely used the Paveh-351 cruise missile during the attack.[34] This missile employs a turbojet engine and takes about two hours to reach Israel from Iran.[35] Iran’s development of cruise missiles with ramjet engines would likely improve Iran’s ability to conduct effective cruise missile attacks. FT noted that Iranian defense officials were reportedly negotiating the next phase of the cruise missile technology agreement with Russia as of June 2026.[36]

Developing cruise missile technology takes substantial time, and it is currently unclear how far along Iran is in developing this technology. The Indian Navy developed a similar supersonic anti-ship cruise missile with NPO Mashinostroyeniya in 1998, but the missile was not fully operational until 2005.[37] The Russo-Iranian cooperation on supersonic cruise missile technology began in 2023, and Iran has been in two full-scale wars against the United States and Israel since then.[38] ISW-CTP cannot determine the timeline required for Iran to fully operationalize this technology.

Iran is likely pursuing two separate but related lines of effort to advance Iranian objectives in Iraq amid Iraqi government efforts to disarm Iranian-backed Iraqi militias. Informed sources told Iraqi media on September 1 that Iran pushed unspecified Iraqi government actors and Iranian-backed Iraqi militias to reach a settlement in which the militias would “discreetly” retain their weapons by storing them either in Popular Mobilization Forces (PMF)-controlled depots or in the militias’ own depots under the condition that they would not use them without PMF approval.[39] This settlement would likely mean, in reality, that the Iranian-backed militia-controlled PMF would accept and oversee weapons from Iranian-backed militias that answer to Iran and operate outside of the PMF.[40]

This Iranian effort comes amid Iraqi Prime Minister Ali al Zaydi’s attempts to reform the PMF through an amended draft PMF Law that could fulfill US objectives regarding militia disarmament.[41] The Iraqi Parliament is unlikely to approve the amended law, given that parliamentarians affiliated with Iraqi

militias that control PMF brigades are parliamentary committee members who must review and approve the draft law before Parliament can convene and vote on the law.[42] The United States has pressured Zaydi to disarm the militias due to militia attacks on US and foreign targets in Iraq and the region in recent months, to which Zaydi responded by setting a September 30 deadline to restrict arms to the state and taking limited steps toward disarmament.^[43] Iraqi Commander-in-Chief Spokesperson Sabah Numan recently claimed on August 28 that the militias have so far surrendered half of their weapons.[44] It is nearly impossible for the Iraqi government to verify this information given the clandestine nature of the militias, however.[45]

This Iranian effort to circumvent disarmament by potentially giving the PMF control over militia weapons comes as Iran is also reportedly pursuing a plan to build a new cadre of smaller, more ideological militias over which Iran would have strong control. These militias would support the political activity of existing Iranian-backed Iraqi actors. Security sources told Iraqi media on September 1 that unspecified actors, almost certainly referring to Iran, may create small, anonymous groups that do not have the name of known militias after the implementation of the disarmament settlement described above.[46] The sources added that the unspecified actors could use these new groups to support the political activity of existing Iranian-backed Iraqi actors, such as by threatening government officials opposed to Iranian-backed Iraqi actors' agendas.[47] This effort is also consistent with Iran's reported effort to encourage some of its larger Iraqi militia partners to move into politics.[48] Iraqi sources told Reuters in June that the IRGC has reportedly formed multiple Iraqi militia cells that directly report to the IRGC, possibly in an initial effort to build this new, loyal cadre of ideological militias.[49] Iran may calculate that these new militias would still be able to access weapons under PMF control, even if the cell members only respond to the IRGC. This calculation, however, depends on Iran continuing to wield influence over the PMF.

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*

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Hezbollah is very likely training and equipping Syrian Assadist insurgents to conduct attacks in Syrian territory to destabilize Syria and prevent Syrian government forces from disrupting Hezbollah's military activities. Lebanese and international media reported on September 2 that Lebanese General Security forces arrested five Syrian and Lebanese members of an Assadist insurgent network, including a former Assad regime intelligence officer, in Akkar District, northern Lebanon.[50] Lebanese judicial and security sources said that the network includes at least 50 Assadist fighters who reached Hezbollah training camps in the Bekaa Valley.[51] The fighters typically travel from Syria's coastal provinces through northern and eastern Lebanon to Beirut's Hezbollah-dominated southern suburbs before departing for the training camps.[52] Lebanese media reported on September 2 that Hezbollah is training Assadist insurgents to assemble and pilot drones and prepare improvised explosive devices before the fighters return to Syria.[53] The judicial and security sources also told Saudi media that the insurgents primarily intend to conduct attacks in Syria's Alawite-majority coastal provinces, as well as coordinate assassinations and destabilize both Lebanon and Syria.[54]

Hezbollah likely intends for such attacks to compel the Syrian government to divert resources from counter-smuggling efforts to focus on threats to Syrian stability.[55] Lebanese and Syrian authorities have threatened Hezbollah's weapons smuggling activities in recent months by interdicting Hezbollah weapons shipments and expanding border security coordination.[56] Hezbollah's strategic objective in Syria is to redevelop and preserve its ground lines of communication (GLOCs) from Iraq to Lebanon, through which the group receives weapons and components from Iran. Hezbollah likely calculates that destabilizing Syria and forcing Syrian forces to focus on internal threats will enable the group to reconstitute these GLOCs. ISW-CTP previously reported in January 2026 that former Assad regime officers have attempted to organize insurgent activity against the Syrian government from Lebanese territory, although Alawite and Assadist insurgents have not conducted a successful attack in Syria since December 2025.[57]

Iraq

See topline section.

Arabian Peninsula

Nothing significant to report.

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Iran Update, September 3, 2026



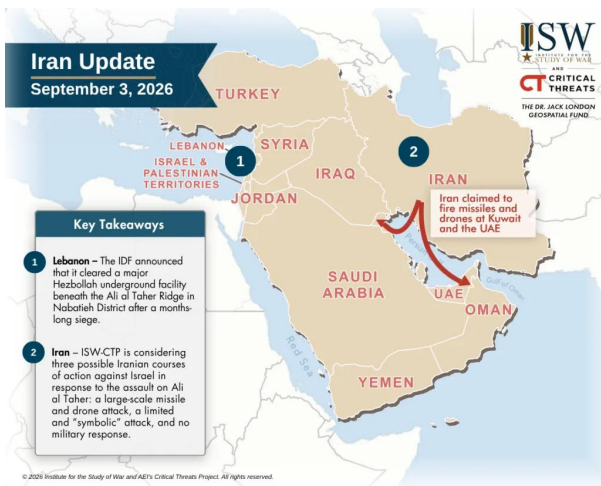
William Doran, Adham Fattah, Parker Hempel, Bailey Pasternak, Ria Reddy, Kelly Campa

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 updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events from the preceding weekend, collected after ISW-CTP's 2:00 PM ET Friday data cutoff. ISW-CTP may publish special updates on Saturdays and Sundays if events warrant, however.

Key Takeaways

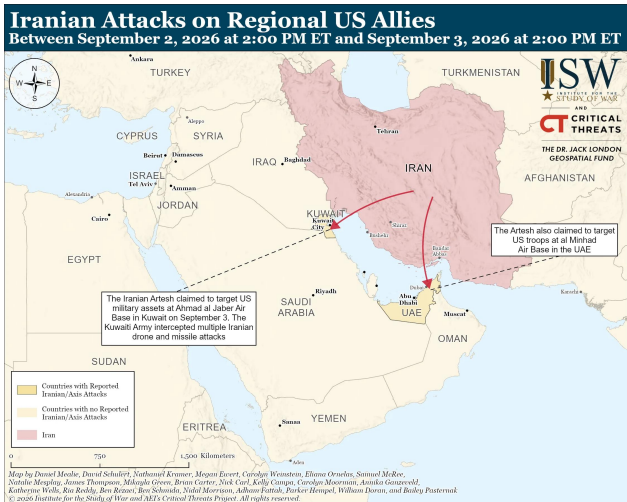
1. The Iranian Artesh conducted a missile and drone attack targeting US bases in Kuwait and the United Arab Emirates on September 3, likely as part of the regime's efforts to raise the costs of the US campaign against Iran. The latest Iranian strikes bear some similarity to a recent Iranian attack on Jordan that some Iranian military officials have claimed is reflective of a new Iranian targeting doctrine that reportedly includes preemptive strikes against US military assets in the region.
2. The Israel Defense Forces (IDF) announced on September 3 that it cleared a major Hezbollah underground facility beneath the Ali al Taher Ridge in Nabatieh District after a months-long siege. Ali al Taher occupies advantageous terrain overlooking the Litani River and the neighboring Houla Valley, which enabled Hezbollah to target Israeli forces in southern Lebanon and civilian settlements in northern Israel.
3. ISW-CTP is considering three possible Iranian courses of action against Israel in response to the assault on Ali al Taher: a large-scale missile and drone attack, a limited and "symbolic" attack, and no military response. Iranian officials reportedly warned the United States in mid-August 2026 that Iran would respond to any offensive to seize the Ali al Taher facility with a "large-scale attack" on Israel, according to unspecified regional sources speaking to Reuters. All courses of action rely upon the assumption that the reporting about the Iranian warning is accurate.



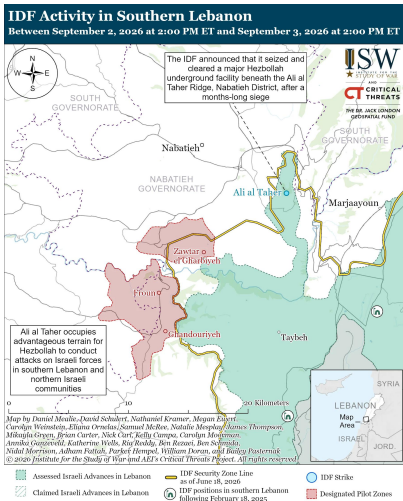
Toplines

The Iranian Artesh conducted a missile and drone attack targeting US bases in Kuwait and the United Arab Emirates (UAE) on September 3, likely as part of the regime's efforts to raise the costs of the US campaign against Iran.[1] The Artesh stated that its forces targeted satellite communications systems, equipment warehouses, and fighter aircraft hangars at Ahmad al Jaber Air Base in Kuwait.[2] The Artesh added that its forces also targeted troop positions and radar installations at al Minhda Air Base in the UAE.[3] An unspecified US defense official told anti-regime media on September 3 that the Iranian strikes did not impact any US bases.[4]

The latest Iranian strikes bear some similarity to a recent Iranian attack on Jordan that some Iranian military officials have claimed reflects a new Iranian targeting doctrine. Iran's strikes on September 3 are a slight departure from the established pattern of tit-for-tat strikes between US and Iranian forces in recent weeks. Iranian forces targeted US bases in Kuwait, Jordan, Bahrain, and Iraq on September 2 in response to the most recent US strikes on Iranian coastal targets on September 1.[5] Iran's most recent strikes in Kuwait and the UAE do not immediately follow additional strikes on US bases and thus represent a slight deviation from Iran's typical attack pattern during the current phase of the war. Iran previously conducted a similar "surprise" attack against US forces in Jordan on July 28 after a four-day pause in strikes observed by both sides.[6] ISW-CTP assessed at the time that the regime likely calculated that inflicting US casualties or damage during such a pause could degrade US willingness to continue the conflict.[7] Iranian Artesh Spokesperson Brigadier General Mohammad Akraminia stated on August 26 that one of Iran's newest targeting doctrines includes preemptive strikes against US military assets in the region and cited the July 28 attack in Jordan as an example of this doctrine.[8] The Artesh's latest strikes in Kuwait and the UAE may also reflect this preemptive strike doctrine as part of the regime's attempts to erode US willingness to continue the campaign against the regime.



The Israel Defense Forces (IDF) announced on September 3 that it cleared a major Hezbollah underground facility beneath the Ali al Taher Ridge in the Nabatieh District after a months-long siege.[9] The IDF announced that 36th Armored Division forces killed many of the remaining Hezbollah fighters within the complex while others fled the vicinity.[10] The IDF surrounded Ali al Taher in late June 2026 and isolated the remaining Hezbollah forces in the underground facility for over two months.[11] Ali al Taher occupies advantageous terrain overlooking the Litani River and the neighboring Houla Valley that enabled Hezbollah to target Israeli forces in southern Lebanon and civilian settlements in northern Israel.[12] Unspecified regional sources told Reuters on September 3 that the IDF trapped at least 12 Iranian Islamic Revolutionary Guards Corps (IRGC) soldiers, including two senior officers, embedded with the Hezbollah contingent at Ali al Taher since June.[13] Israeli media, citing IDF assessments, reported on September 3 that no IRGC soldiers remain at the facility, however.[14] Neither Hezbollah nor the IRGC has officially acknowledged that the IDF has fully cleared the Ali al Taher facility as of this writing.



ISW-CTP is considering three possible Iranian courses of action (COAs) against Israel in response to the assault on Ali al Taher. Iranian officials reportedly warned the United States in mid-August 2026 that Iran would respond to any offensive to seize the Ali al Taher facility with a “large-scale attack” on Israel, according to unspecified regional sources speaking to Reuters.[15] Lebanese media reported on August 14 that Iran issued a warning similar to the one described by sources to Reuters.[16] All of the following COAs rely upon the assumption that the reporting about the Iranian warning is accurate.

- In a most dangerous COA, Iran conducts a large-scale missile and drone attack targeting Israel in the coming days or weeks designed to deter future Israeli attacks against Hezbollah.** Iran nearly collapsed the ceasefire on June 7 by attacking Israel in order to retaliate for an Israeli airstrike that targeted a Hezbollah first-person view (FPV) drone command headquarters in Beirut's southern suburbs.[17] The attack followed public Iranian warnings that any Israeli attack on Beirut would prompt an Iranian attack on Israel.[18] IRGC Commander Ahmad Vahidi — whom ISW-CTP continues to assess is playing an outsized role in decision-making — successfully pushed for Iranian military action against Israel in response to the IDF's attack in Beirut's southern suburbs in June.[19] ISW-CTP also assesses that Vahidi's faction is willing to risk renewed conflict if doing so enables them to achieve their core objectives.[20] Iranian officials within this faction have previously treated the cessation of attacks on regional allies, including Hezbollah, as a core demand.[21] Senior Israeli officials told Israeli media on September 3 that Israeli decision-makers have not observed Iranian "intention[s]" to attack Israel in the immediate term.[22]
- Iran conducts a limited, "symbolic" attack on Israeli military targets intended to demonstrate support for Hezbollah without risking a major US-Israeli combined force response.** Iranian leaders may feel compelled to respond to the IDF's clearing operations at Ali al Taher to demonstrate their willingness to protect the Axis of Resistance and strengthen the Axis's deterrence against Israel and the United States, particularly amid current US, Israeli, and Lebanese efforts to disarm Hezbollah.[23] Iranian leaders may opt for a limited military response to achieve these effects, however, for a variety of reasons. Key Iranian decision-makers like Vahidi may see a symbolic strike on Israel that does not target major cities or civilian centers as a sufficient warning to Israel and the United States. These leaders might also consider a symbolic strike sufficient to respond to the IDF's potential killing of IRGC soldiers at Ali al Taher.[24] Iranian leaders may also prefer a limited response that employs a small number of munitions due to the reported degradation of Iran's ballistic missile capabilities following repeated combined force strikes on Iranian missile production sites, stockpiles, and launchers since at least February 2026.[25] ISW-CTP reported on September 2 that the roughly 50 percent reported failure rate of Iranian ballistic missiles fired at Jordan in recent days may reflect degraded longer-range missile capabilities, which are necessary for any Iranian attack on Israel.[26]
- Iran refrains from attacking Israel in order to avoid Israeli military action against Iran.** Iranian leaders may calculate that the Ali al Taher facility is too militarily insignificant to warrant a military response that risks combined force strikes, a possible expansion of the current conflict, and increased risk of internal instability. Israeli Defense Minister Israel Katz announced on September 3 that Israel would target all kinds of Iranian infrastructure, including energy infrastructure sites, if Iran attacked Israel.[27] The Iranian regime has shown growing concern in recent weeks that its deteriorating economic conditions could trigger anti-regime protests.[28] Iranian leaders almost certainly recognize that Israeli strikes against critical infrastructure could further weaken the economy and increase the risk of domestic unrest as a result.
 - Iran's discreet warning to the United States may also merely reflect an Iranian effort to generate a purely informational effect that would compel the United States to restrict Israeli activity in Lebanon.[29] Regime officials have also not publicly threatened that Iran would respond militarily to an IDF offensive against Hezbollah at Ali al Taher. The lack of a public Iranian promise to attack Israel in the event of an IDF offensive at Ali al Taher could indicate that Iranian leaders sought to maintain plausible deniability and avoid committing to a renewed direct conflict with Israel.[30]

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

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

The IDF returned a Lebanese detainee to Lebanese authorities on September 3 to advance Israel and Lebanon's implementation of the June 26 Trilateral Framework, according to an unspecified Lebanese official speaking to Western media.[31] The IDF is expected to release four additional detainees in exchange for the remains of Jewish civilians and military personnel that Hezbollah killed.[32] The Trilateral Framework agreement does not require Israel and Lebanon to release prisoners, but this exchange could advance stalled progress in implementing the agreement.[33] Saudi media reported on September 3 that US, Israeli, and Lebanese delegations are expected to hold political talks in Rome in mid-September and separate military talks at the US Central Command (CENTCOM) headquarters in Tampa, Florida at an unspecified date.[34]

Iraq

An Iraqi Federal Court sentenced three individuals to fifteen years in prison on September 3 for their participation in a March 13 rocket attack against Iraqi and French forces at the K1 base in Kirkuk Province.[35] US forces handed over the K1 base to the Iraqi government in 2020.[36] French forces have remained at the K1 base since at least 2023 to advise and support Iraqi counterterrorism forces as part of Operation Inherent Resolve.[37] The affiliation of the sentenced individuals is unclear. Likely Iranian-backed Iraqi militia front group Kataib Sarqhat al Quds threatened on March 13 to strike French forces at the K1 base, however.[38] The likely front group's threat also came

after a likely militia drone struck and killed one French soldier and injured six others in Erbil on March 12.[39] The Iraqi Judiciary has sentenced multiple Iranian-backed Iraqi militia-affiliated individuals in recent days for attacks and activities conducted since March 2026.[40]

The Iraqi Kurdistan Counter Terrorism Service reported that coalition forces intercepted 10 drones that an unspecified actor launched over Erbil, Iraqi Kurdistan, on September 3.[41]

Security sources told Iraqi media that the drones were not targeting the US Consulate or US bases in Erbil when coalition air defenses intercepted the drones.[42] No actor has claimed responsibility for the attack as of this writing. Iranian-backed Iraqi militias have launched numerous attacks against US positions in Iraqi Kurdistan in March and April 2026.[43] Iran has also repeatedly launched drone and missile strikes targeting US forces in Erbil and Iranian Kurdish opposition groups in Iraqi Kurdistan.[44]

Arabian Peninsula

Nothing significant to report.

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Iran Update, September 4, 2026



Katherine Wells, Bailey Pasternak, Ben Rezaei, William Doran, Parker Hempel, Carolyn Moorman, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events from the preceding weekend, collected after ISW-CTP's 2:00 PM ET Friday data cutoff. ISW-CTP may publish special updates on Saturdays and Sundays if events warrant, however.

Key Takeaways

1. Recent Iranian attacks on US regional assets indicate that Iranian decision-makers — particularly the hardline Islamic Revolutionary Guards Corps (IRGC) faction that appears to be controlling decision-making — are dissatisfied with the current status of the war because Iran has not yet achieved its key objectives in the conflict, namely securing recognized control over the Strait of Hormuz. These decision-makers appear intent on trying to change the trajectory of the conflict through the use of military force.
2. Iran is facing several constraints that are limiting its ability to achieve its political objectives in the war. The operational constraints imposed by US strikes are temporary, and Iran will likely try to reconstitute its degraded capabilities and develop new capabilities to adapt to the constraints on its military campaign.
3. Iran's ongoing cash flow crisis will likely limit Iran's ability to overcome these constraints in the near term. Iran is facing a shortage of foreign currency reserves and access to US dollars, which has been exacerbated by intensifying US economic pressure.
4. Iran is constrained by its relationships with the Gulf states because it seeks to increase political and economic costs on the United States while, at least at this time, avoiding actions that could push the Gulf states to support a resumption of large-scale US operations against Iran. Iran has also faced consistent opposition from the Gulf states toward its efforts to control shipping in the strait.

Toplines

Recent Iranian attacks on US regional assets indicate that Iranian decision-makers — particularly the hardline Islamic Revolutionary Guards Corps (IRGC) faction that appears to be controlling decision-making — are dissatisfied with the current status of the war because

Iran has not yet achieved its key objectives in the conflict, namely securing recognized control over the Strait of Hormuz. These decision-makers appear intent on trying to change the trajectory of the conflict through the use of military force. Iran launched drone and missile attacks at US bases in the United Arab Emirates (UAE), Kuwait, and Jordan on September 3 and 4.[1] These attacks are part of Iran's months-long military campaign to erode US resolve to continue the war and coerce the United States to surrender to Iranian demands. Iranian decision-makers believe that Iran can outlast the United States' will to continue the war and have calculated throughout the war that they can increase US domestic pressure on US President Donald Trump's administration to stop the war by increasing international oil prices.[2] The Iranian regime indicated at the start of its campaign to disrupt shipping in the Strait of Hormuz in March that its goal was to increase oil prices to \$200 USD per barrel.[3] Oil prices did initially spike at the start of Iran's campaign, but oil prices have remained below \$100 USD per barrel since May.[4] The United States also appears to be having some success in facilitating the flow of oil out of the strait. US Energy Secretary Chris Wright recently noted that 17 million barrels of oil — close to pre-war levels of around 20 million barrels per day — exited the strait on August 31, for example.[5]

Iran may be waiting for a more advantageous moment to drive up oil prices and increase pressure on the United States, potentially timing such actions around the period leading up to the US midterm elections. Such a decision would be intended to raise economic and political costs for the Trump administration to pressure it to end the conflict and acquiesce to Iranian demands.

Iran is facing several constraints that are limiting its ability to achieve its political objectives in the war. Iran is facing structural limitations that are, by Iran's own standards, hindering the success of Iran's military campaign. Iran has structured its armed forces and invested in capabilities that are meant to affect Iranian adversaries' resolve, but these tools are currently not bearing success for Iran. The IRGC Navy, for example, has heavily relied on asymmetric capabilities, such as laying mines in the strait and launching missiles at commercial vessels, to disrupt shipping in the strait during the war.[6] The United States has cleared the strait of mines and degraded Iran's ability to mine the strait, rendering this Iranian tactic currently ineffective.[7]

ISW-CTP has not observed an increase in Iranian drone and missile attacks on commercial vessels in the Strait of Hormuz despite the reported increase in vessel traffic through the waterway, which suggests that Iran is struggling to fix commercial vessel targets.[8] Iran would presumably increase attacks on commercial vessels in response to increased traffic through the strait if it had the ability to do so, given that Iran is dissatisfied with the current state of the war. "Fixing" a target is part of the "find, fix, finish" targeting cycle, which involves forces detecting and identifying a specific threat (find), tracking and pinpointing its exact location in time and space to prevent escape (fix), and deploying military options to capture, neutralize, or destroy the target (finish).[9] Most Iranian systems are GPS-guided, which means that Iran must be able to track the speed and heading of a commercial vessel in order to determine the coordinates to strike the vessel at a certain time.[10] Without being able to fix a commercial vessel target and track it over time, Iran is unable to determine the coordinates to attack the vessel. Recent US strikes have targeted Iranian coastal radars, which could, at least partially, explain Iran's difficulty in fixing targets.[11] Other actions, such as electronic warfare, could also disrupt Iran's ability to fix targets.[12]

The operational constraints imposed by US strikes are temporary, and Iran will likely try to reconstitute its degraded capabilities and develop new capabilities to adapt to the constraints on its military campaign. Iran has recently adopted suboptimal methods, such as attempting to use rockets to launch naval mines and using fast attack craft (FAC) to identify commercial vessels, in response to US strikes on Iranian military capabilities.[13] Iran has sought to rebuild these

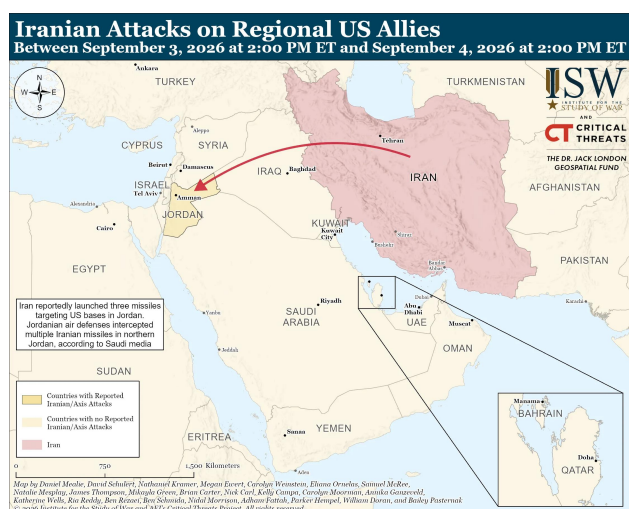
capabilities, including radars. US President Donald Trump noted on September 1 that US forces had struck radars that Iran had “almost” rebuilt, for example.[14] Iran will also likely try to develop new technologies and capabilities to avoid facing the same constraints in the future.

Iran’s ongoing cash flow crisis will likely limit Iran’s ability to overcome the challenges outlined above in the near term. Iran is facing a shortage of foreign currency reserves and access to US dollars, which has been exacerbated by intensifying US economic pressure.[15] The US blockade on Iranian ports is preventing Iran from generating revenue from its illicit international oil trade.[16] US sanctions have also targeted the Iranian regime’s other illicit channels and its ability to move cash around.[17] Even the UAE — a traditional hub for Iranian trade and illicit financing — has started reducing economic ties with Iran as part of the United States and its allies’ economic pressure campaign against Iran.[18]

US sanctions also make it difficult for Iran to send funds to its proxies and partners.[19] Recent regional reporting indicates that Iran is struggling to transfer funds to Hezbollah.[20] The lack of funding for these groups will restrain one of Iran’s main mechanisms for projecting power beyond its borders and pressuring the United States and its regional allies.[21]

Iran is constrained by its relationships with the Gulf states because it seeks to increase political and economic costs on the United States while, at least at this time, avoiding actions that could push the Gulf states to support a resumption of large-scale US operations against Iran. Gulf states such as Saudi Arabia, Qatar, and the UAE persuaded the United States in early August not to resume the war with Iran.[22] Iran currently appears reluctant to drive these states to change their opposition to large-scale fighting, which constrains the actions Iran can take to impose pressure on the United States. Large-scale Iranian attacks on regional energy infrastructure would likely drive up global oil prices, but such attacks would also increase the risk of changing the Gulf states’ aversion to resuming the war, for example.

Iran has also faced consistent opposition from the Gulf states toward its efforts to control shipping in the strait. Iran’s most amiable regional partner, Oman, reportedly rejected a bilateral agreement with Iran over managing the strait because of Iran’s insistence on enforcing service “fees.”[23] Iran was required, under the memorandum of understanding (MoU), to negotiate an arrangement for the Strait of Hormuz with Oman. Oman and the rest of the Gulf states’ opposition to Iranian control of the strait constrains Iranian efforts to secure formal recognition of the waterway.



Current indicators suggest that Iran and Hezbollah are unlikely to respond to the Israel

Defense Forces' (IDF) announcement that it cleared a major underground Hezbollah facility beneath the Ali al Taher Ridge in Lebanon on September 3 by attacking Israel in the near term.[24] Iranian media and Hezbollah officials are instead attempting to understate Ali al Taher's military significance, likely in an effort to mitigate Hezbollah's loss without escalating with the IDF. ISW-CTP outlined three possible courses of action that Iran could take in response to the IDF's clearing of Ali al Taher on September 3, including a large-scale missile and drone attack targeting Israel, a limited "symbolic" attack on Israeli military targets to demonstrate solidarity with Hezbollah without risking a massive US-Israeli response, and the possibility that Iran would refrain from attacking Israel in order to avoid a kinetic response.[25] Ali al Taher occupies advantageous terrain overlooking the Litani River and the neighboring Houla Valley that enabled Hezbollah to target Israeli forces in southern Lebanon and civilian settlements in northern Israel.[26] Iranian regime media outlets argued on September 4 that the IDF exaggerated the physical size and military significance of Ali al Taher in order to bolster Israeli Prime Minister Benjamin Netanyahu's reelection campaign ahead of Israeli elections in October.[27] Iranian media efforts to downplay the significance of Ali al Taher suggest that Iran is not likely to attack Israel in response in the near term, despite recent reports that unspecified Iranian officials threatened Israel that it would do so if Israel began an offensive to seize the area.[28] Iran previously launched missiles at Israel in June following Israeli strikes on a Hezbollah first-person view (FPV) drone headquarters in Beirut's southern suburbs.[29] Iranian military and security officials publicly threatened to strike Israel in response to the IDF strikes on Beirut but did not make the same public threats before or after the IDF cleared Ali al Taher.[30] Iran's reported missile strikes targeting US bases in Jordan on September 4 could be in response to the IDF clearing Ali al Taher, but Iran has previously confined its response attacks following Israeli kinetic activity against Hezbollah in southern Lebanon to striking Israel rather than other regional targets.[31]

Hezbollah is similarly attempting to downplay the significance of Ali al Taher, which indicates that Hezbollah is also unlikely to attack Israel in the near term. Hezbollah Political Council Deputy Chairman Mahmoud Qamati, the most senior Hezbollah official to comment on Ali al Taher at the time of this writing, stated on September 4 that the Israeli government is overemphasizing the military importance of Ali al Taher and is using the site to help Netanyahu's political campaign.[32] Current Hezbollah messaging around Ali al Taher echoes similar statements that Hezbollah officials made after the IDF announced that it surrounded Ali al Taher in late June 2026.[33] Ali al Taher was a significant military asset for Hezbollah, however. Hezbollah reportedly spent 20 years constructing the tunnels beneath Ali al Taher that previously contained the headquarters of Hezbollah's Badr Unit, which is one of the main Hezbollah units that has engaged the IDF in southern Lebanon.[34]

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*

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Recent leadership changes within Iran's security apparatus and calls for deeper judicial and technological cooperation with the People's Republic of China (PRC) may reflect Iranian regime efforts to prepare for renewed domestic unrest. Iranian Law Enforcement Command (LEC) Commander Brigadier General Ahmad Reza Radan appointed nine senior officials on September 4.[35] Radan appointed a new Prevention Police chief, human resources deputy, command oversight official, and head of his Special Office, among others.[36] Radan appointed former Tehran Municipality Basij head Hadi Sahami to head his Special Office.[37] Tehran Province IRGC Mohammad Rasoul Ollah Unit Commander Brigadier General Hassan Hassanzadeh appointed Sahami to his previous position in 2022 and tasked him with serving as a "link" between the Basij and Tehran municipal institutions.[38] Sahami's appointment could therefore be meant to facilitate greater coordination between the LEC and the Basij. Judiciary Chief Gholam Hossein Mohseni Ejei separately called for deeper judicial and technological cooperation with the PRC, including the use of artificial intelligence in judicial affairs, during a September 3 meeting with Chinese Supreme Court Chief Justice Zhang Jun in India.[39] These discussions are notable given that Iran has previously sought the PRC's support to expand its domestic surveillance capabilities, including through Chinese-made facial-recognition technology and law enforcement cooperation.[40] Radan previously expanded LEC cooperation with the PRC, including through a 2024 law enforcement MoU and an agreement in January 2026 that covered public and political security.[41] Radan's appointments and Ejei's meeting with a Chinese judicial official come amid Iranian officials' heightened concern that worsening economic conditions could trigger renewed anti-regime protests, such as those that occurred in Winter 2025-2026.[42]

Lebanon

The IDF returned four additional Lebanese detainees to Lebanese authorities on September 4 to advance the implementation of the June 26 Israel-Lebanon Trilateral Framework Agreement.[43] The International Committee of the Red Cross announced that it successfully facilitated the return of five Israeli-held Lebanese detainees to Lebanon on September 3 and 4.[44] Israeli Prime Minister Benjamin Netanyahu announced on September 3 that Israel agreed to release the five Lebanese individuals to advance ongoing Israel-Lebanon negotiations after Lebanon helped Israel search for the remains of Lebanese Jewish leaders killed during the Lebanese Civil War.[45] Lebanese President Joseph Aoun thanked the United States for securing the release of the five Lebanese citizens during a meeting with US Ambassador to Lebanon Michel Issa and a US Congressional delegation on September 4.[46] Aoun stated that the United States and Lebanon must secure the release of the remaining Israeli-held Lebanese detainees, in accordance with the Trilateral Framework Agreement.[47] Two Lebanese sources told Reuters that 35 Lebanese citizens remain in Israeli custody.[48] Aoun and the US delegation also discussed ongoing preparations for the next round of US-mediated Israel-Lebanon negotiations.[49] Saudi media reported on September 3 that US, Israeli, and Lebanese delegations are expected to hold political talks in Rome in mid-September and separate military talks at the US Central Command headquarters in

Tampa, Florida, on an unspecified date.[50]

Iraq

Iraq, the Kurdistan Regional Government (KRG), and Turkey have reportedly begun to implement a mechanism to disarm the Kurdistan Workers' Party (PKK) in Iraq, according to Turkish and Kurdish media on September 4.[51] The PKK, which Turkey and the United States have designated as a terrorist organization, announced its intention to dissolve and disarm in May 2025.[52] Turkish media reported on August 31 that Iraq, the KRG, and Turkey agreed on a framework to disarm the PKK.[53] The framework reportedly stipulates that Turkish intelligence will monitor PKK camps in northern Iraq to verify the group's disarmament while Iraqi border security and Iraqi Kurdish Peshmerga forces receive weapons from PKK fighters and backfill PKK positions in areas they withdraw from, according to Turkish media.[54] Kurdish and Turkish media reported that Turkey and Iraq seek to disarm and evacuate PKK members from 18 PKK camps and 72 near-border positions by October 1.[55] It is unclear whether Turkish forces will withdraw from northern Iraq once Turkey verifies the PKK's complete disarmament in Iraq. Turkey has long used the PKK's continued activity in the area to justify Turkey's bases in northern Iraq, which Iranian-backed militias oppose.[56] Some Iranian-backed Iraqi militias have conditioned their disarmament on Turkey's withdrawal from northern Iraq, among other demands, in response to Iraqi Prime Minister Ali al Zaydi's efforts to restrict weapons to the state.[57] The militias' use of this precondition, among other demands, indicates that the militias do not intend to disarm.[58]

Arabian Peninsula

Nothing significant to report.

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