

Iran Update, September 7, 2026



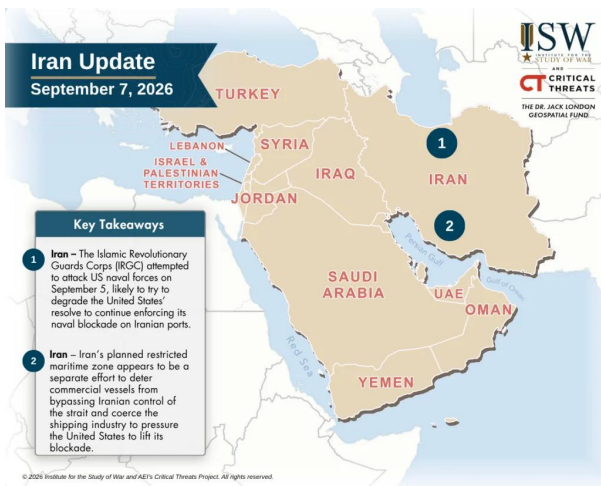
Ben Rezaei, William Doran, Bailey Pasternak, Parker Hempel, Benjamin Schmida, Annika Ganzeveld

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. The Islamic Revolutionary Guards Corps (IRGC) attempted to attack US naval forces on September 5, likely to try to degrade the United States' resolve to continue enforcing its naval blockade on Iranian ports. The IRGC Aerospace Force announced on September 5 that it targeted a US aircraft carrier and destroyer because the vessels were enforcing the US naval blockade. US Central Command (CENTCOM) confirmed that Iran launched ballistic missiles at two US Navy warships but noted that the missiles did not hit the warships or cause any casualties.
2. The IRGC may have also conducted the attack to deter US forces from facilitating the transit of commercial vessels through the strait amid indications that Iran may be facing constraints in its maritime surveillance, targeting, and mine-laying capabilities.
3. Iran's planned restricted maritime zone appears to be a separate effort to deter commercial vessels from bypassing Iranian control of the strait and coerce the shipping industry to pressure the United States to lift its blockade.
4. Iran's recent efforts to coerce the United States to lift its blockade may reflect growing regime concerns about the blockade's impact on the Iranian economy. Iran has a growing incentive to find alternative ways to force the United States to end its blockade, including by raising the military costs of enforcement for the United States and increasing commercial costs for vessels that bypass Iranian control.



Toplines

The Islamic Revolutionary Guards Corps (IRGC) attempted to attack US naval forces on September 5, likely to try to degrade the United States' resolve to continue enforcing its naval blockade on Iranian ports. The IRGC Aerospace Force announced on September 5 that it targeted a US aircraft carrier and destroyer because the vessels were enforcing the US naval blockade.[1] US Central Command (CENTCOM) confirmed that Iran launched ballistic missiles at two US Navy warships but noted that the missiles did not hit the warships or cause any casualties.[2] Iranian Supreme National Security Council (SNSC) Secretary Mohsen Rezaei claimed that Iran tested a new “destroyer missile” in the attack, but ISW-CTP cannot verify what type of system Iran used in the attack.[3] CENTCOM responded to the Iranian attacks by disabling two Iranian oil tankers and destroying a third, after which Iran claimed it attacked six commercial vessels.[4] There is no evidence that Iran conducted these attacks on civilian vessels, however. The Iranian Khatam ol Anbia Central Headquarters warned on September 5 that Iran would conduct more severe attacks on US military vessels if the United States maintains its blockade.[5] Rezaei separately claimed on September 6 that a successful Iranian strike on a US warship could inflict significant US casualties, likely to try to weaken the United States' willingness to continue to enforce the blockade by highlighting the regime's willingness to target and inflict harm on US naval forces.[6] Iran likely calculates that raising the military and political costs of enforcing the blockade will weaken US willingness to sustain it and ultimately pressure the United States to end the blockade, thereby improving Iran's ability to assert its claimed control over the strait and reduce economic pressure on the regime.

The IRGC may have also conducted the attack to deter US forces from facilitating the transit of commercial vessels through the strait amid indications that Iran may be facing constraints in its maritime surveillance, targeting, and mine-laying capabilities.[7] US forces have helped commercial vessels transit the southern route of the strait, which has increased traffic through the strait and undermined Iran's effort to compel vessels to use its illegal traffic separation scheme.[8] Recent US strikes have degraded Iranian coastal radars and surveillance equipment, mine-laying capabilities, and other systems that the IRGC has relied on to monitor and threaten commercial shipping.[9] Iran has consequently adopted less effective methods, including using fast attack craft to visually identify vessels and shore-based rocket launchers to deploy mines, in its efforts to control shipping in the strait.[10] Iran may have directly threatened US naval forces to deter these forces from supporting efforts to restore freedom of navigation in the Strait of Hormuz that undermine Iran's claimed control of the strait.

Iran's planned restricted maritime zone appears to be a separate effort to deter commercial vessels from bypassing Iranian control of the strait and coerce the shipping industry to

pressure the United States to lift its blockade. Rezaei announced on September 6 that Iran will establish a “restricted zone” extending from the US blockade line south of the Strait of Hormuz to the Persian Gulf.[11] Rezaei said that vessels entering the zone must follow Iranian transit requirements and that Iran will place violators on a “sanctions list” and restrict their future passage through the strait.[12] Rezaei stated that the zone will remain in place for as long as the US naval blockade continues, directly linking the measure to Iran’s efforts to pressure the United States to lift its blockade.[13]

Iran appears to be trying to extend the geographic scope of rules and penalties it has already sought to impose on the shipping industry, rather than creating an entirely new system of transit regulations. Rezaei’s reference to a “sanctions list” likely refers to the Persian Gulf Strait Authority’s (PGSA) “non-compliant vessels list” rather than sanctions similar to US financial sanctions.[14] Vessels on this list can face fines, detention, or confiscation during future passages.[15] The “restricted zone” therefore appears to be an attempt to extend Iran’s existing coercive framework beyond the strait toward the US blockade line, but the transit regulations and penalties Iran intends to impose on vessels do not appear to have changed.

Iran could try to use the “restricted zone” framework to justify future vessel boardings, detentions, or seizures by framing them as consistent with Iranian maritime regulations. Iran could claim that a vessel violated its declared transit requirements and portray an IRGC boarding or seizure of a vessel as a legitimate enforcement mechanism under Iran’s interpretation of maritime law. Detaining or confiscating vessels would require Iran to use force. Rezaei clarified that Iran will not attack vessels in the “restricted zone” outside the strait but he did not rule out attacks or other coercive actions against vessels once they enter the strait.[16]

Iran’s recent efforts to coerce the United States to lift its blockade may reflect growing regime concerns about the blockade’s impact on the Iranian economy. Rezaei acknowledged on September 6 that commercial vessels continue to transit the strait with US assistance and indicated that Iran is trying to change this situation.[17] This comment is consistent with ISW-CTP’s September 4 assessment that Iranian decision-makers appear dissatisfied with the current status of the war because the United States is having some success in facilitating the flow of oil out of the strait and oil prices have plateaued below \$100 per barrel in recent months.[18] These conditions undermine Iran’s efforts to use control of the strait and high global energy prices to increase pressure on the United States. The US naval blockade and recent strikes on Iranian tankers are also significantly limiting Iran’s ability to export oil, the regime’s main source of revenue. Energy firm Kpler reported on September 7 that Iranian crude oil stored on vessels outside the blockade has fallen from roughly 90 million barrels in mid-July to about 29 million barrels, for example.[19] US economic pressure has forced the regime to take steps that risk increasing public frustration toward the regime. The Iranian government announced that it will raise third-tier gasoline prices to 100,000 rials per liter beginning on September 8.[20] A previous fuel price increase in 2019 triggered large-scale protests across Iran.[21] The regime’s decision to increase third-tier gasoline prices reflects the difficult situation the regime is in as it tries to mitigate the impacts of US economic pressure while not taking drastic economic measures that could spur domestic unrest. These conditions highlight how Iran has a growing incentive to find alternative ways to force the United States to end its blockade, including by raising the military costs of enforcement for the United States and increasing commercial costs for vessels that bypass Iranian control.

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

The Israel Defense Forces (IDF) conducted dozens of airstrikes that targeted Hezbollah fighters and infrastructure across southern Lebanon following five Hezbollah one-way drone attacks on Israeli forces in southern Lebanon, including Ali al Taher, between September 4 and 7.[22] Hezbollah has not claimed responsibility for the drone attacks at the time of this writing, however. It is possible that Hezbollah carried out these attacks in response to the IDF clearing Ali al Taher on September 3, but these attacks would represent a relatively small response relative to losing Ali al Taher, which was a significant command and control facility for the group.[23] ISW-CTP assessed on September 4 that Hezbollah would likely not attack Israeli territory in the near term in response to the IDF's clearing of Ali al Taher.[24] A Hezbollah fighter separately wounded two IDF soldiers with small arms fire near Beaufort Castle in Nabatieh Governorate on September 7.[25]

The IDF is reportedly developing a plan to reduce its force presence in Lebanon and redeploy forces to a new security line south of the IDF's current "Yellow Line" in southern Lebanon.[26] Israeli security sources told Israeli media on September 5 that the possible IDF force reduction and repositioning in this proposed plan would happen at an unspecified point after the IDF demolishes the Ali al Taher tunnel complex.[27] The IDF would reportedly redeploy to Israeli outposts located along the "Grey Line"—a newly proposed Israeli security line in southern Lebanon that extends between two and four kilometers within Lebanese territory along the Israel-Lebanon border.[28] The IDF's "Yellow Line" currently extends between eight and 10 kilometers within Lebanese territory from the Israel-Lebanon border.[29] The security sources said that the proposed force reduction and redeployment plan has not yet been authorized by Israeli political leadership.[30] Israeli Defense Minister Israel Katz stated on September 4 that the IDF would redeploy to unspecified "appropriate" positions in Lebanon after completing its demolition efforts at Ali al Taher, but reiterated that the IDF will not withdraw from the "security zone" in southern Lebanon until Hezbollah is completely disarmed throughout Lebanon.[31]

Iraq

Nothing significant to report.

Arabian Peninsula

The Houthis likely conducted a ballistic missile attack targeting an oil refinery in Jizan, Saudi Arabia, on September 7.[32] Two unspecified sources told the *Financial Times* on September 7 that an unknown actor fired projectiles that struck the Saudi Aramco refinery in Jizan, which the Houthis have attacked several times since the group began to enforce its blockade on Saudi Arabia on July 20.[33] Satellite imagery from September 7 showed smoke and fires at the refinery after the likely Houthi attack, although Saudi Arabia has not acknowledged the attack and the Houthis have not claimed responsibility for the attack at the time of this writing.[34] Houthi media reported that Saudi Arabia conducted airstrikes and cruise missile attacks on unspecified locations in several Houthi-controlled Yemeni provinces on September 7, but it is unclear whether these strikes occurred before or after the attack on Jizan.[35] The Houthis have repeatedly attacked Saudi oil infrastructure to impose political and economic costs on Saudi Arabia to compel Saudi Arabia to end its kinetic campaign and accept Houthi demands.[36]



The Houthis may have targeted the Jizan refinery on September 7 to deter Saudi Arabia from supporting ongoing Republic of Yemen Government (ROYG) offensive campaigns against the Houthis in northern, central, and southern Yemen in the near term.[37] ROYG and allied Yemeni forces have engaged the Houthis on several fronts, with ROYG officials, Saudi media, and a Yemeni journalist reporting limited Saudi-backed advances into Houthi-controlled territory.[38] ROYG military media claimed on September 5 that ROYG forces advanced into and established control over Hays District in southern Hudaydah Province, but ISW-CTP cannot confirm this claim.[39]

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Iran Update, September 8, 2026



Bailey Pasternak, William Doran, Adham Fattah, Carolyn Moorman, Ria Reddy, Brian Carter

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Key Takeaways

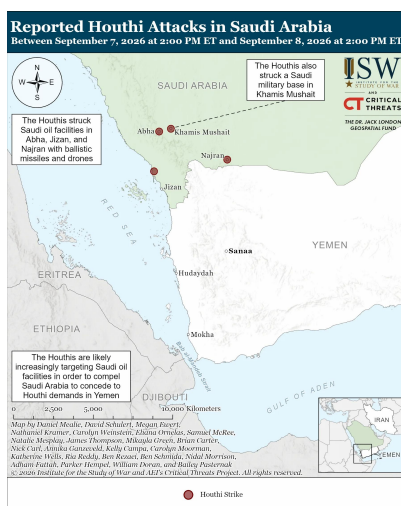
1. The Houthis have shifted their tactics toward increasingly targeting Saudi oil facilities, likely after recognizing that their naval blockade of Saudi vessels in the Red Sea has failed to compel Saudi Arabia to meet Houthi demands in Yemen.
2. The National Resistance Forces (NRF), which is a component of the Republic of Yemen Government (ROYG), conducted a counteroffensive in southern Hudaydah Governorate on September 5, possibly to relieve Houthi pressure on NRF forces near Taiz City. The principal challenge for the NRF will be exploiting any tactical offensive successes, however. One intermediate NRF and ROYG objective is to capture al Jarrahi, a crossroads town that lies astride a major Houthi supply line between Hudaydah City and Taiz City, and its environs.
3. Hudaydah could be the ultimate objective of the offensive, but NRF and ROYG-aligned forces will need to seize intermediate objectives long before Hudaydah. Hudaydah is critical to both Houthi civilian and military goods, and its loss would be a significant setback for the Houthis.

Toplines

The Houthis have shifted their tactics toward increasingly targeting Saudi oil facilities, likely after recognizing that their naval blockade of Saudi vessels in the Red Sea has failed to compel Saudi Arabia to meet Houthi demands in Yemen. Western media reported in August 2026 that Saudi Arabia has largely diverted its oil exports away from the Red Sea and is instead exporting its oil primarily from Yanbu Port, north of the Bab al Mandeb and Houthi-controlled territory in Yemen, through the Suez Canal since the Houthis imposed a naval blockade against Saudi vessels in the Red Sea in late July.[1] Saudi Arabia's ability to reroute its oil exports has almost certainly reduced the blockade's economic impact on Saudi Arabia. The Houthis last targeted a Saudi vessel off the coast of Yanbu on August 24.[2] The lack of Houthi attacks on Saudi vessels in the Red Sea in recent weeks suggests that

the Houthis either cannot target vessels, which is unlikely, or recognize that the blockade has failed to impose sufficient pressure on Saudi Arabia.

The Houthis are likely adapting by increasingly targeting Saudi oil facilities to increase the costs of Saudi military operations in Yemen as part of a broader Houthi effort to compel Saudi Arabia to concede to its demands. The Houthis struck Saudi oil facilities in Abha, Jizan, and Najran, and a Saudi military base in Khamis Mushait with ballistic missiles and drones on September 8.[3] These strikes follow a likely Houthi ballistic missile attack targeting Jizan on September 7.[4] Official Houthi media stated on September 8 that the group will continue to target Saudi Arabia's "economic arteries" until Saudi Arabia ceases all military operations in Yemen, lifts its blockade on Houthi-controlled ports and airports, pays Houthi officials' salaries, and pays the Houthis war reparations for Saudi and Republic of Yemen Government (ROYG)-aligned military operations in Yemen.[5] The Houthis are likely attacking Saudi Arabia's ability to export oil in order to try to raise Saudi political and economic costs to an untenable level and compel Saudi leaders to terminate military operations against the Houthis in Yemen.[6] The Houthis previously employed a similar tactic in 2022 by targeting an oil facility at Jizan, which directly preceded the ceasefire agreement in 2022.[7]



The National Resistance Forces (NRF), which is a component of ROYG, and other ROYG-aligned forces conducted a counteroffensive in southern Hudaydah Governorate on September 5, possibly to relieve Houthi pressure on NRF and ROYG-aligned forces near Taiz City.[8] ROYG military media claimed on September 5 that the NRF advanced into and established control over Hays District in southern Hudaydah Governorate on Yemen's Red Sea coastal plain.[9] These counterattacks are a response to Houthi attacks on NRF and ROYG forces in Hudaydah and Taiz governorates.[10] The Houthis have engaged NRF and ROYG-aligned forces in western Taiz Governorate between Taiz City and Mokha Port.[11] The NRF counteroffensive on the coastal plain may seek to force the Houthis to divert forces from Taiz to defend against the new NRF and ROYG-aligned threat in southern Hudaydah, thereby relieving pressure around Taiz. One intermediate NRF and ROYG-aligned objective is to capture al Jarrahi, a crossroads town that lies astride a major Houthi supply line between Hudaydah City and Taiz City, and its environs.[12] This threat could convince Houthi leaders to redirect forces from the Taiz City front toward al Jarrahi to meet NRF and other ROYG-aligned forces moving northwards.

ROYG leaders may be publicly discussing their intent to capture Hudaydah City from the Houthis in order to generate an informational effect that could also compel the Houthis to divert forces from the Taiz City front.[13] ROYG leaders have described the ROYG-aligned counteroffensive in southern Hudaydah Governorate as the start of a campaign to capture the Houthis' main seaport at Hudaydah City and deny

the Houthis access to the Red Sea.[14] Hudaydah is critical to both Houthi civilian and military goods, and its loss would be a significant setback for the Houthis.[15] Threats to Hudaydah could, therefore, prompt the Houthis to divert forces from other fronts to deal with this new threat.

Hudaydah could be the ultimate objective of this offensive, but NRF and ROYG-aligned forces will need to seize intermediate objectives long before Hudaydah. An NRF and ROYG-aligned campaign to capture Hudaydah City would be difficult to sustain, however, because such a campaign would require a considerable military force operating along extensive supply lines that are far removed from the NRF's long-held defensive positions.[16] Al Jarrahi is a more feasible intermediate operational objective after the capture of Hays District.[17] Offensive operations by Yemeni forces that meet committed defensive action by hostile Yemeni forces in this war usually fail to achieve major operational- or strategic-level breakthroughs. This phenomenon was evident in Marib in Fall 2021, for example, when Houthi assaults could only gradually take territory.[18] Major breakthroughs during this war most often occur when the opposing force collapses or retreats for political reasons.

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*

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

The Iranian regime has reportedly deployed security forces across Iran, likely in order to try to prevent domestic unrest amid Iran's worsening economic crisis and recent fuel price hikes.

An anti-regime media outlet posted footage from September 7 of Iranian Basij and Law Enforcement Command (LEC) special units deployed in Tehran, Khorramabad in Lorestan Province, and Tabriz in East Azerbaijan Province.[19] The outlet separately claimed that the regime also deployed security forces to several other cities, including Esfahan, Abadan in Khuzestan Province, and Shiraz in Fars Province.[20] CTP-ISW is unable to confirm the veracity of these reports, however.

These reports, if accurate, are notable because the government deployed security forces on the same day it increased gasoline prices.[21] A previous fuel price increase in 2019 triggered large-scale protests across Iran, and the regime just faced its largest protest wave in January 2026 over economic grievances.[22] The regime's decision to raise gasoline prices despite the risk of renewed unrest

emphasizes the severity of Iran's economic situation.

The price hikes and the deployments come as the United States has intensified its efforts to pressure Iran's economy. The US Treasury Department announced on September 8 new sanctions against 36 targets supporting Iran's aviation sector that allow Iran to move weapons, personnel, and illicit cargo, for example.[23] One Iran analyst noted that Iran's aviation sector is a major earner of hard currency for the regime.[24]

Iranian media reported that Iran's naval forces used Qassem Basir ballistic missiles in their failed September 6 attack on the US Navy aircraft carrier USS George Washington.[25] The Qassem Basir is a solid-fueled medium-range ballistic missile with a 1,200-kilometer range and a maneuverable reentry vehicle (MaRV). The MaRV allows missiles to maneuver mid-flight, which can help them evade air defenses.[26] US officials previously told the *Wall Street Journal* in July 2026 that Iranian forces had adapted to US defenses and begun using high-speed missiles that maneuver in the air to target US bases, likely referring to missiles equipped with MaRVs.[27] Iranian outlet Tabnak stated on September 7 that Iran is shifting its focus from extending its missile range to improving missile accuracy, mobility, survivability, and operational flexibility.[28]

A US military official said that US forces lost an outdated underwater drone due to a malfunction after the Islamic Revolutionary Guards Corps (IRGC) claimed that it captured an Anduril Dive-LD autonomous undersea vessel.[29] The US official did not confirm the Iranian claim that Iran's navy has the submarine.[30] The official added that the defective drone was surveying regional waters in support of ongoing US operations, carried no classified sonar or radar equipment, and collected no sensitive data.[31] The IRGC claimed that the drone was an Anduril Dive-LD, which would be inconsistent with the US military official's report that the drone was outdated. The Dive-LD is a new long-endurance, deep-diving autonomous undersea vehicle designed for defense missions, including subsea intelligence and surveillance, mine warfare, and payload deployment at depths up to 6,000 meters.[32]

Lebanon

Nothing significant to report.

Iraq

The Iraqi federal government has reportedly issued a memorandum that appears designed to restrict the movement and activities of senior Iranian security and military officials in Iraq, including IRGC Quds Force Commander Brigadier General Esmail Ghaani.[33] Lebanese media, citing "reliable" Iraqi sources, reported on September 6 that the memorandum stipulates that Iraqi Prime Minister Ali al Zaydi must approve any Iranian official's visit to Iraq.[34] The sources added that the Council of Ministers will also evaluate the "political and economic repercussions" of such visits for Iraq.[35] The federal government reportedly must also verify the Iranian official's schedule.[36] The memorandum states that approved visits can only occur in official government buildings in Baghdad, according to the Iraqi sources.[37] Any Iranian officials with approved visits to Iraq are then to be warned against interfering in Iraqi affairs.[38] The memorandum also reportedly explicitly restricts Iranian officials with security or military backgrounds from visiting Iraq.[39] It is unclear how and if the Iraqi federal government will enforce this while IRGC members are reportedly advising Iranian-backed Iraqi militias in Iraq.[40] Iranian Ambassador to Iraq Mohammad Kazem Sadegh is also reportedly a Quds Force member.[41] The Iraqi sources noted that Ghaani's visit to Iraq in early July to attend former

Iranian Supreme Leader Ali Khamenei's funeral procession violated an earlier version of this memorandum.[42] Ghaani met with Shia Coordination Framework officials and Iraqi militia leaders in August, reportedly urging against the militias handing over their weapons to the government as part of the federal government's disarmament campaign.[43] The new memorandum comes amid the Iraqi government's continued efforts to restrict weapons to the state and ongoing US efforts to pressure the government to limit Iranian influence in Iraq.

The Shia Coordination Framework discussed the legislation concerning the Iranian-backed Popular Mobilization Forces (PMF) during a framework meeting on September 7.[44] The framework released a statement following the meeting and stated that they discussed passing the PMF law in a way that "regulates the PMF's work and strengthens the PMF's role within state institutions." [45] The framework's statement is likely referring to the Popular Mobilization Authority draft law. Former Prime Minister Mohammad Shia al Sudani withdrew a previous iteration of the draft law from Parliament in August 2025, reportedly due to US pressure.[46] Iraqi and regional media have recently released conflicting reports on the Iraqi federal government's efforts to amend the draft law. An informed source told Iraqi media on August 30 that the Iraqi federal government will soon refer the PMF law to Parliament after removing two paragraphs in the draft law.[47] A senior Iraqi government source separately told UK-based Qatari-owned media on August 25 that unspecified actors made several amendments to a PMF-affiliated "draft law" that aim to limit the PMF's operational powers.[48] Zaydi is likely behind such amendments given his recent actions to consolidate his individual power as prime minister, such as placing several security institutions under a re-established executive office that answers directly to him. The amended version of the PMF draft law has not yet been made public.

Arabian Peninsula

See topline section.

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Iran Update, September 9, 2026



Ben Rezaei, Parker Hempel, William Doran, Nidal Morrison, Katherine Wells, 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. Iran has launched a concerted effort in recent days to more aggressively target US naval forces, likely to degrade the United States' willingness and ability to continue enforcing the US naval blockade on Iranian ports.
2. US officials warned that Iran may be using "more sophisticated weapons" to target US vessels in recent days.
3. Iran may be relying upon targeting assistance from Russia or the People's Republic of China to support Iranian attacks on US warships and vessels. US officials raised their concerns to the Wall Street Journal that Russian or PRC targeting assistance enabled Iran's recent attacks against US vessels.
4. Iran appears to be targeting anchored and docked commercial vessels in the Persian Gulf and Gulf of Oman, likely to deter the United States from conducting further strikes on Iranian oil tankers.
5. Iranian targeting constraints may be contributing to Iran's decision to target stationary vessels. ISW-CTP recently assessed on September 4 that Iran is struggling to fix moving commercial-vessel targets, given that Iran has not increased attacks on moving civilian vessels in the Strait of Hormuz despite the reported increase in the flow of traffic through the waterway.
6. The Iranian regime is framing its retaliation against vessels that do not comply with Iranian policies in the Strait of Hormuz as its own Iranian enforcement of a "sanctions regime" in order to legitimize illegal Iranian activities against commercial vessels.
7. Iran used cluster munition ballistic missiles in an attack on US forces in Jordan on September 9, which indicates that Iran sought to inflict greater damage or casualties to impose further human and political costs on the United States.

Toplines

Iran has launched a concerted effort to more aggressively target US naval forces in recent days, likely to degrade the United States' willingness and ability to continue enforcing the US naval blockade on Iranian ports. Iran has fired an unspecified number of ballistic missiles at a US aircraft carrier, US Navy destroyers, and at least one US Marine vessel since September 4, according to US officials speaking to the *Wall Street Journal*.^[1] The Islamic Revolutionary Guards Corps (IRGC) Aerospace Force attempted to attack two US Navy warships on September 5, and US Central Command (CENTCOM) noted on September 8 that the IRGC fired ballistic missiles targeting a US Navy warship twice in the past two days.^[2] US officials described some of the attacks as “close calls.”^[3] Iran likely aims to degrade US willingness and ability to enforce the US blockade on Iranian ports through a concerted effort to target US naval vessels. The IRGC said that it conducted its attempted attack on September 5 targeting US warships because the vessels' crew were enforcing the US blockade.^[4] Iran is likely attempting to achieve this objective by imposing tactical and operational-level effects on the United States. Iran likely aims to degrade US capabilities to enforce the blockade by inflicting damage to US vessels and assets, including aircraft. Damaging or even disabling US ships or aircraft may necessitate the vessels return to port for repair or resupply, which would force them to withdraw for a period of time. Iran also likely aims to inflict casualties among US servicemembers to raise the political costs of maintaining the US blockade.

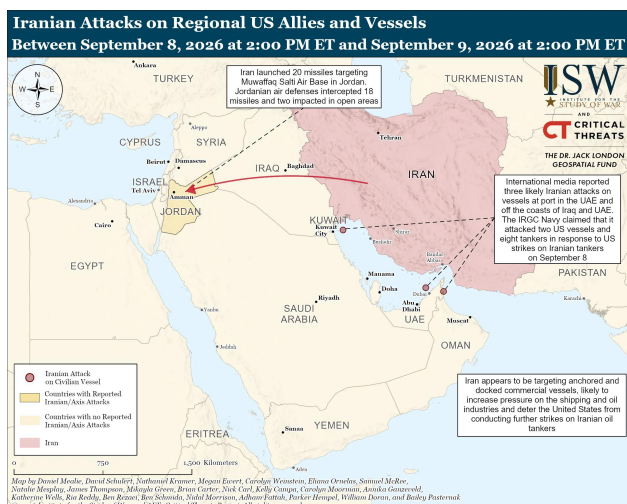
US officials warned on September 8 that Iran may be using “more sophisticated weapons” to target US vessels in recent days.^[5] Iranian officials have claimed that Iran used new missiles to target US naval vessels, including medium-range Qassem Basir missiles.^[6] The Qassem Basir, which Iran unveiled in May 2025, is a solid-fueled medium-range ballistic missile with a 1,200-kilometer range and a maneuverable reentry vehicle (MaRV).^[7] The MaRV allows missiles to maneuver mid-flight, which can help them evade air defenses. The Qassem Basir is reportedly equipped with electro-optical seeker technology capable of tracking moving targets, according to the *Telegraph*.^[8] It remains unclear whether Iran used the Qassem Basir in the recent attacks on US warships, however. Iran would still need sufficiently accurate information on the vessel's approximate location before launch, even if Iranian forces fired Qassem Basir missiles.

Iran may be relying upon targeting assistance from Russia or the People's Republic of China (PRC) to support Iranian attacks on US warships and vessels. US officials raised their concerns to the *Wall Street Journal* that Russian or PRC targeting assistance enabled Iran's recent attacks against US vessels.^[9] Both Russia and the PRC have provided Iran with intelligence and satellite imagery that could support Iran's ability to target US military positions, including naval forces.^[10] US officials stated in March 2026 that Russia shared the locations of US military assets, including warships and aircraft, with Iran.^[11] The United States sanctioned several PRC-based entities in May 2026 for providing Iran with satellite imagery of US facilities in the Middle East.^[12]

Iran appears to be targeting stationary commercial vessels in the Persian Gulf and Gulf of Oman, likely to deter the United States from conducting further strikes on Iranian oil tankers. US forces destroyed five Iranian crude oil tankers on September 8.^[13] The United States has destroyed 10 Iranian tankers in total since September 5 in response to Iran's attacks on US naval forces.^[14] The IRGC Navy issued an evacuation warning following the US tanker attacks on September 8 to tanker crews near Kuwaiti and Bahraini ports that host US forces and threatened to attack the crews “at anchor or at the ports.”^[15] Iran may calculate that attacking non-Iranian commercial vessels in response to US strikes on Iran's tanker fleet will compel shipping companies and regional commercial actors to pressure the United States to stop targeting Iranian tankers. Iran likely attacked three tankers on September 9: the *Hercules Star*, which was anchored off the coast of Dubai, UAE; an unspecified liquefied natural gas

(LNG) tanker at port in Khor Fakkan, UAE; and the *New Andros* in Iraqi territorial waters.[16] Two of these vessels, the *Hercules Star* and the unspecified LNG tanker, were docked in port or anchored, which means that they were not in motion when Iran struck them.[17] Iran's targeting of stationary ships also enables Iran to demonstrate that commercial vessels remain vulnerable even when anchored or in port, which Iran may calculate could build pressure among shipping companies on the United States to end attacks on Iranian tankers.

Iranian targeting constraints may also be contributing to Iran's decision to target stationary vessels. Iran has occasionally struck stationary vessels throughout the war.[18] CTP-ISW recently assessed on September 4 that Iran is struggling to fix moving commercial-vessel targets, given that Iran has not increased attacks on moving civilian vessels in the Strait of Hormuz despite the reported increase in the flow of traffic through the waterway.[19] "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).[20] Stationary vessels are easier targets because Iranian forces do not need to continuously locate and update the position of a moving vessel before striking. Iran may therefore be adapting its targeting approach to preserve its ability to threaten regional shipping despite its surveillance and targeting constraints.[21]



The Iranian regime is also framing its retaliation against vessels that do not comply with Iranian policies in the Strait of Hormuz as Iranian enforcement of a "sanctions regime" in order to legitimize illegal Iranian activities against commercial vessels. IRGC spokesperson Brigadier General Hossein Mohebbi warned on September 9 that any vessel entering the "restricted area" of the Strait of Hormuz without coordination will be subject to Iranian "sanctions." [22] Mohebbi and Supreme National Security Council Secretary Major General Mohsen Rezaei have referred in recent days to Iran levying "sanctions" against vessels that violate Iranian transit requirements.[23] These officials are likely referring to the "sanctions list" the Persian Gulf Strait Authority's (PGSA) "non-compliant vessels list" rather than internationally recognized sanctions similar to US financial sanctions.[24] Iran can impose fines on, or seize these blacklisted vessels during future passages, according to Mohebbi and Rezaei.[25] Iran is attempting to use international legal terms to justify denying select vessels or countries access to the strait as a legitimate action that Iran can take.

Iran used cluster munition ballistic missiles in an attack on US forces in Jordan on September 9, which indicates that Iran sought to inflict greater damage or casualties to impose further human and political costs on the United States. [26] A Fox News journalist reported that Iran fired missiles containing cluster munitions in an attack targeting Muwaffaq Salti Airbase in Azraq, Jordan, on

September 8.[27] Two US officials said that the attack resulted in "minimal" damage to US equipment and caused no deaths among US servicemembers.[28] Jordanian air defenses intercepted 18 and allowed two missiles to fall in unpopulated areas.[29] It is unclear how many of these missiles contained cluster munitions. Cluster munitions disperse over a wide area and are intended to maximize damage. Iran has extensively deployed cluster warheads in attacks targeting Israel in this most recent war in order to maximize casualties and impose psychological terror among the Israeli population. Israeli media estimated that about 70 percent of Iranian missiles launched at Israel in late March 2026 contained cluster munitions.[30] Iran may have fired cluster munitions targeting Muwaffaq Salti Airbase to maximize US casualties and damage to equipment.

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

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

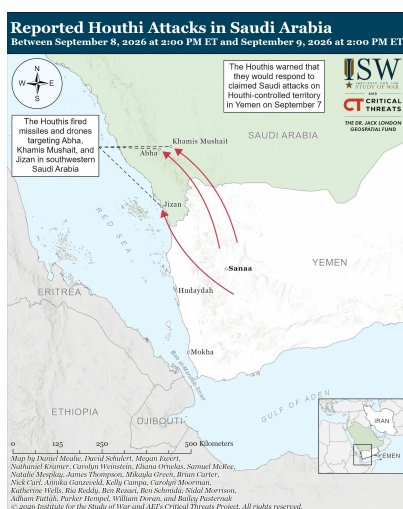
The United States called on the Iraqi federal government to support US efforts targeting Iran's sanctions evasion networks, according to an unnamed US State Department spokesperson speaking to Iraqi media on September 9.[31] The spokesperson called on the Iraqi government to support efforts to isolate Iran economically through the US Treasury Department's Operation Economic Outcast, including through dismantling Iran's sanctions evasion networks.[32] Iran has long exploited Iraqi financial institutions to evade sanctions, illicitly obtain US dollars, launder money, and generate revenue for Iranian-backed Iraqi militias.[33] The spokesperson's call to the Iraqi

government comes amid recent US pressure on the Iraqi federal government to dismantle Iranian and Iranian-backed Iraqi militia-associated financial networks as part of the broader US strategy to curb Iranian influence in Iraq and its exploitation of Iraqi financial institutions for sanctions evasion.[34]

National State Forces Coalition leader Ammar al Hakim called for the Iraqi government to reward Iranian-backed militias that have surrendered their weapons with policymaking roles in the federal government on September 9.[35] Hakim, whose political coalition is part of the political alliance called the Shia Coordination Framework, told Iraqi Kurdish media on September 9 that the government is currently involved in “intensive” negotiations with militias on issues related to Prime Minister Ali al Zaydi’s calls for the militias to disarm.[36] It is unclear whether Hakim’s request referred to the prospect of offering militia leaders favored positions in the Iraqi federal government or more broadly employing disarmed militia fighters in formal Iraqi state security organs. Zaydi has reportedly considered a plan to incorporate disarmed militia fighters into Iraqi state security organs, including the Counter Terrorism Service (CTS), in recent months, according to unspecified Iraqi sources.[37] **Any Iraqi militia disarmament plan that grants formal state security roles to Iranian-backed militia members but does not address militias’ allegiance and connections to Iran will likely further entrench Iranian influence within the Iraqi state.[38] This poses a particular risk for specialized security organs like the CTS, which the United States developed during the Iraq War and has historically been protected from Iranian infiltration.[39]**

Arabian Peninsula

Pakistani Defense Minister Khawaja Asif stated on September 8 that Pakistan could provide military support to Saudi Arabia under the Mecca Joint Defense Agreement if the Houthis continue to attack Saudi Arabia.[40] Saudi Arabia, Pakistan, and Turkey formed the defensive alliance on August 7.[41] The pact includes a collective defense framework in which an attack on one alliance member state is viewed as an attack on all members.[42] Asif reiterated to Pakistani media on September 8 that the alliance members will honor the agreement if there is “aggression” against one of its members.[43] Asif directly warned the Houthis that their attacks on Saudi Arabia “could make this agreement operational.”[44] Asif acknowledged that he is unaware if Saudi Arabia has requested that Pakistan and Turkey provide military support to Saudi Arabia amid the Houthis’ ongoing attacks (see below).[45]



The Houthis launched additional ballistic missile and drone attacks on targets in southwestern Saudi Arabia on September 9.[46] The Saudi-led coalition spokesperson, Major

General Turki al Maliki, announced that the Houthis launched an unspecified number of drones and missiles targeting Khamis Mushait and Abha in Asir Province and Jizan in Jizan Province.[47] Maliki did not specify whether Saudi air defenses intercepted any of the projectiles or any details about the intended targets in these locations. Houthi military spokesperson Yahya Sarea warned on September 9 that the Houthis would retaliate against Saudi Arabia over alleged Saudi attacks launched from Saudi airbases in Khamis Mushait on September 7.[48] The Houthis have not claimed the attack at the time of this writing. The Houthis have increasingly targeted Saudi oil facilities to increase the costs of Saudi military operations in Yemen as part of a broader Houthi effort to compel Saudi Arabia to concede to Houthi demands.[49] The Houthis struck Saudi oil facilities in Abha, Jizan, and Najran, and a Saudi military base in Khamis Mushait with ballistic missiles and drones on September 8, for example.[50]

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Iran Update September 10, 2026



Katherine Wells, William Doran, Ben Rezaei, Parker Hempel, 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 Houthi offensive to capture territory near the Bab al Mandeb advances Iranian objectives under the current regional campaign that Iran is waging against the United States and its allies. Iran has recently pursued the following lines of effort under this regional campaign: Targeting US naval forces; Attacking US forces across the region; Disrupting traffic through the Strait of Hormuz.
2. The Houthis and Iran may currently share a common objective in Houthi control over the Red Sea coastline, but the nature of their relationship means that the Houthis will independently determine their level of involvement in supporting other Iranian objectives.
3. The Houthis' capture of Mokha Port and reported landings on islands near the Bab al Mandeb may set conditions for potential Houthi efforts to establish themselves as a legitimate authority and guarantor of passage through the strait, as Iran has attempted to do in the Strait of Hormuz.
4. The Houthis exploited military developments in southwestern Yemen in recent days to conduct an offensive against Republic of Yemen Government (ROYG)-aligned forces along the Red Sea coastal plain and capture Mokha. The Houthis have also reportedly attempted to seize ROYG-controlled islands in the Red Sea from which Houthi fighters could launch attacks on international shipping.
5. The Houthis' coastal plain offensive accomplished significant Houthi operational and strategic objectives that weaken the ROYG's ability to disrupt Houthi operations and exert both short-term leverage over Saudi Arabia and possible long-term leverage over the international community. The Houthis could attempt to capture remaining territory on the coastal plain south of Mokha in order to secure lines of communication with Perim Island and exert full control over Yemen's Red Sea coast.

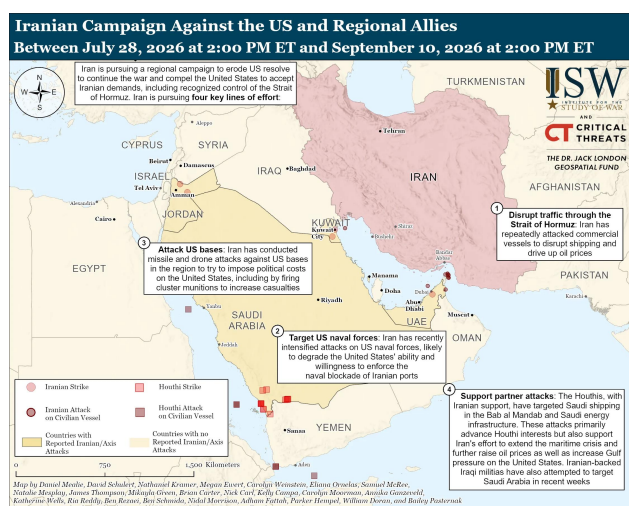
Toplines

The Houthi offensive to capture territory along Yemen's southern Red Sea coastline advances common Houthi and Iranian objectives by improving Houthi positions to threaten shipping

through the Bab al Mandeb Strait.[1] The Houthis captured Mokha Port in Taiz Governorate from Republic of Yemen Government (ROYG)-affiliated forces on September 10.[2] The Houthi seizure of Mokha and additional territory along southwestern Yemen’s coastal plain resulted from conditions created by nearly a week of fighting between Houthi and ROYG forces along frontlines in Hudaydah and Taiz governorates, as described in greater detail below. The Houthis’ improved position along the Red Sea coastline supports current Iranian objectives by providing Iran with additional leverage in its broader regional campaign against the United States. Houthi gains along the Red Sea coast nevertheless do not necessarily indicate that the Houthis will fully align their future operations around the Bab al Mandeb with Iranian objectives.

The Houthi offensive to capture territory near the Bab al Mandeb advances Iranian objectives under the current regional campaign that Iran is waging against the United States and its allies. Iran is currently pursuing a regional campaign that aims to degrade the United States and its allies’ willingness to sustain the war against Iran and coerce the United States to surrender to Iranian demands. Recent Iranian attacks on US regional assets and civilian shipping indicate that Iranian decision-makers — currently dominated by the hardline faction led by Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi—are not satisfied with the current status of the war because Iran has not yet achieved its key objectives in the conflict, such as securing recognized control over the Strait of Hormuz.[3] These decision-makers appear intent on trying to change the current trajectory of the conflict through the use of military force.[4] Iran has recently pursued the following lines of effort under this regional campaign:

- **Targeting US naval forces.** Iran has aggressively targeted US naval forces in recent days, likely to degrade the United States’ willingness and ability to continue enforcing the US naval blockade on Iranian ports.[5]
- **Attacking US forces across the region.** Iran has attacked US bases in Jordan, Kuwait, and Bahrain in recent days in order to weaken the resolve of the United States and its regional allies that host US troops.[6] Iran recently fired a cluster warhead—which contains submunitions that disperse over a wide area — in an attack on a US base in Jordan on September 9, which suggests that Iran sought to inflict greater damage or casualties.[7]
- **Disrupting traffic through the Strait of Hormuz.** Iran has continued to strike commercial vessels in the Strait of Hormuz to disrupt international shipping and raise oil prices.[8] Iran more recently appears to be targeting stationary commercial vessels in the Persian Gulf and Gulf of Oman, likely to deter the United States from conducting further strikes on Iranian oil tankers.[9] Iran has also recently attempted to lay more mines in the strait.[10]



Iran is now attempting to improve its own position along the Bab al Mandeb through its partnership with the Houthis in order to expand its ability to disrupt international shipping routes beyond the Strait of Hormuz as another line of effort with its current regional campaign.[11]

A significant percentage of global trade passes through the Bab al Mandeb daily, and Iranian efforts to exert control over the Strait of Hormuz have increased international reliance on the Bab al Mandeb and Red Sea for the movement of Gulf energy products.[12] Disrupting traffic in the Red Sea through Houthi control over the Bab al Mandeb would enable Iran to attempt to drive further concessions from the United States and regional Gulf allies by disrupting energy and shipping flows and imposing economic costs on Gulf countries. The Houthis do not necessarily need to halt shipping through the Bab al Mandeb for Iran to exploit recent Houthi gains. The Iranian regime has repeatedly used the threat of Houthi attacks in the Bab al Mandeb to attempt to deter the United States from striking critical infrastructure in Iran.[13]

The Iranian regime has actively provided military and financial support to aid the Houthi offensive to seize Mokha Port.[14]

Yemeni government, Iranian, and regional sources separately told Reuters on September 10 that Iran provided arms and guidance to the Houthis to support the offensive to seize Mokha Port, expand Houthi control over the vital Bab al Mandeb Strait, and open a new front in Iran's conflict with the United States.[15] US officials told CNN on September 10 that they believe that there are currently hundreds of IRGC officers in Yemen who are working alongside the Houthis with the goal of ultimately shutting down the Bab al Mandeb Strait.[16] ROYG sources identified IRGC Quds Force Commander Abdolreza Shahlaei as the leader directing the Houthi campaign along the Red Sea coast.[17] Shahlaei is a figure who has been heavily involved in providing military and financial support to the Houthis, including in the 2023-2025 Houthi campaign against Red Sea shipping.[18] Anti-Houthi media reported on August 3 that Shahlaei met with Houthi Supreme Leader Abdulmalik al Houthi in Saada Governorate in northern Yemen to discuss unspecified operations.[19] Shahlaei was also reportedly supervising Houthi operations to dismantle anti-Houthi tribal mobilizations along the Houthi frontlines in eastern Yemen in late July, which underscores the direct role that the Iranian regime plays in supporting Houthi operations.[20]

The Houthis and Iran may currently share a common objective in Houthi control over the Red Sea coastline, but the nature of their relationship means that the Houthis will independently determine their level of involvement in supporting other Iranian objectives.

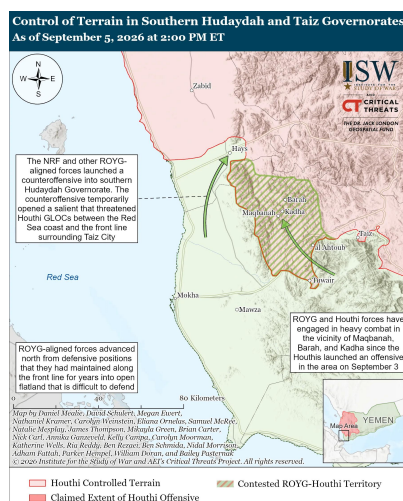
The Houthis view themselves as a coequal partner to Iran rather than as an Iranian proxy. Iran and the Houthis share strategic alignment over key objectives, but the Houthis have historically pursued objectives for their own benefit as well as Iran's. The Houthis have their own strategic objective to ultimately establish control over all of Yemen under a strict Shia-Zaydi theocracy ruled by their own Supreme Leader Abdulmalik al Houthi.[21] Both Iran and the Houthis aim to decrease US influence in the region to impose their own vision of a regional order. Iran has long viewed the Houthis as a partner that can help implement Iran's vision, even though the Houthis sometimes have divergent aims.

Iran may seek to close the Bab al Mandeb in order to drive concessions from the United States, but the Houthis may separately calculate that such an action would not support Houthi interests. ISW-CTP assessed in early April 2026 that the Houthis did not join Iran's regional economic warfare campaign in order to avoid retaliation from the United States and its allies that might jeopardize the Houthi's domestic position.[22] The Houthis refrained from following through on threats to disrupt shipping in the Bab al Mandeb until Houthi leaders decided to impose a blockade on Saudi vessels and ports in late July 2026 in an effort to secure key Houthi demands from Saudi Arabia.[23] It is unclear at this time if the Houthis are seizing territory near the Bab al Mandeb as part of a larger effort to halt all commercial shipping through the strait, particularly given that doing so might prompt significant retaliation from the United States, Saudi Arabia, or other US allies.

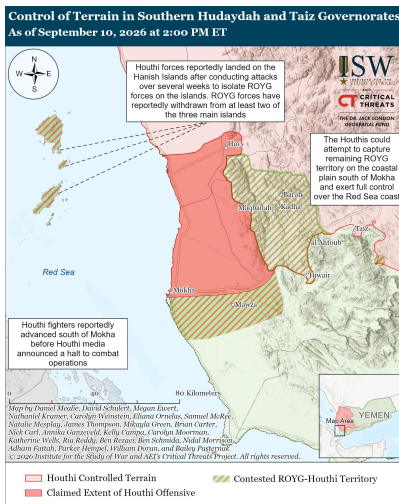
The Houthis' capture of Mokha Port and reported landings on islands near the Bab al Mandeb may set conditions for potential Houthi efforts to establish themselves as a legitimate authority and guarantor of passage through the strait, as Iran has attempted to do in the Strait of Hormuz.[24] Iran is attempting to establish a clear precedent in which an actor can assume control over an international waterway by attacking ships that pass through certain chokepoints.[25] This precedent contradicts international law and maritime norms about freedom of navigation through international waterways.[26] The Houthis have referenced this Iranian model for assuming control over international chokepoints and argued that such a model may apply to the Houthis in the Red Sea, including through the possible imposition of tolls.[27]

The Houthis' consolidation of control over Mokha Port, which is approximately 70 kilometers from shipping lanes through the Bab al Mandeb, would significantly improve Houthi capabilities to target vessels travelling through the strait. Closer positions to Bab al Mandeb shipping lanes enable the Houthis to deploy a broader array of weapons to attack or harass vessels, including missiles, drones, and even artillery, depending on whether the Houthis are able to continue to consolidate control along the Red Sea coastline. Closer positions to the Bab al Mandeb can also ease the Houthis' ability to surveil vessels or even impose fees and other coercive measures similar to those Iran has attempted to establish in the Strait of Hormuz.

The Houthis exploited military developments in southwestern Yemen in recent days to conduct an offensive against ROYG-aligned forces along the Red Sea coastal plain and capture Mokha. The National Resistance Forces (NRF) and other ROYG-aligned forces launched a counteroffensive into the Houthi-controlled coastal plain of southern Hudaydah Governorate on September 5.[28] These ROYG-aligned forces conducted this counteroffensive in response to Houthi attacks on various ROYG-aligned forces, including the NRF, Southern Giants Brigades, and Homeland Shield Forces, in areas of Hudaydah and Taiz governorates between Yemen's coastal plain and the western inland mountain ranges.[29] NRF and other ROYG-aligned forces may have intended to relieve pressure on ROYG forces near Taiz City, which the Houthis had partially isolated by September 5.[30] The counteroffensive temporarily opened a salient on the coastal plain that threatened Houthi ground lines of communication (GLOCs) between the Red Sea coast and the front line surrounding Taiz City.[31]



ROYG-aligned forces established control over Hays District in southern Hudaydah Governorate on September 5 and approached their intermediate objective of capturing al Jarrahi, a crossroad town located on a major Houthi GLOC between the Houthis' main port at Hudaydah City and Taiz City.[32] ROYG leaders publicly discussed their intent to advance north across the coastal plain and capture Hudaydah City as a primary objective of this counteroffensive.[33] The ROYG messaging may have been



The Houthis have reportedly attempted to seize ROYG-controlled islands in the Red Sea from which Houthi fighters could launch attacks on international shipping. Houthi forces reportedly landed on the Hanish Islands in the southern Red Sea on the morning of September 10 after conducting attacks over several weeks to isolate ROYG forces on the islands, according to international media and a US-based Yemen analyst.[49] ROYG political and military sources told international media on September 10 that ROYG forces have withdrawn from at least two of the three main islands in the Hanish Archipelago amid Houthi forces' landings on the islands.[50] Regional media also reported on the afternoon of September 10 that Houthi forces captured Perim Island, which is in the middle of the Bab al Mandeb Strait off the Yemeni coast's southwestern-most headland at Ras Menheli.[51] ISW-CTP cannot yet confirm that the Houthis have established control over the Hanish Islands and Perim, however. Control over the Hanish Islands and Perim Island would offer the Houthis favorable positions from which to launch fast attack craft and projectile attacks on international civilian vessels at close range, provided that the Houthis develop secure logistics lines to transport weapons and supplies from the Yemeni mainland.

The Houthis' coastal plain offensive accomplished significant Houthi operational and strategic objectives that weaken the ROYG's ability to disrupt Houthi operations and exert both short-term leverage over Saudi Arabia and possible long-term leverage over the international community. The Houthis have denied the ROYG access to its primary port on the Red Sea by capturing Mokha. This development is particularly damaging to the NRF—which was headquartered in Mokha before its withdrawal to Dhubab on September 10—because NRF and other ROYG-aligned forces had to abandon Saudi military equipment held in the city due to the swift pace of the Houthis' assault.[52] ROYG forces are also less capable of disrupting Houthi smuggling routes and military operations in the Red Sea after withdrawing from Mokha. The Houthis depend heavily upon sea lines of communication in the Red Sea and Bab al Mandeb to import both civilian and military goods.[53] Port facilities on the Red Sea coast were vital to ROYG operations against Houthi smuggling and military activity. ROYG media claimed in late August 2026 that ROYG forces engaged and intercepted various Houthi small craft in the Red Sea, particularly in the vicinity of the Hanish Islands, for example.[54] The NRF also seized a shipment of drone components intended for the Houthis from a vessel reportedly traveling from Djibouti to Hudaydah City on August 24.[55]

The Houthi offensive campaign on the Red Sea coastal plain is part of a recent, broader shift in Houthi military activity that is intended to compel Saudi Arabia to submit to Houthi demands. The Houthis have targeted Saudi vessels less in recent weeks amid Saudi efforts to divert oil exports away from the Bab al Mandeb, according to Western media in August 2026.[56] The Houthis have instead increasingly targeted Saudi oil infrastructure and other sites in Saudi territory because the Houthis seek to compel Saudi

leaders to submit to the Houthis' terms by maximizing Saudi political and economic costs.[57] The Houthis' demands include a Saudi withdrawal of all military forces and support assets from Yemeni territory, an end to the Saudi blockade on Houthi-controlled territory, payments of Houthi officials' salaries, and war reparations for Saudi and ROYG-aligned military operations in Yemen.[58]

The Houthis' capture of Mokha and possible control over islands in the southern Red Sea also provides the group with long-term leverage over international shipping. The Houthis could use a permanent force presence along the coastal plain and on islands in the Red Sea to attack international vessels in the future, as the Houthis are also enemies of the United States, Israel, and other international partners.

The Houthis have not yet indicated a firm intent to continue or halt their offensive, although the Houthis could attempt to capture remaining territory on the coastal plain south of Mokha in order to secure lines of communication with Perim Island and exert full control over Yemen's Red Sea coast.[59] The Houthis' reported halt to combat operations on September 10 does not indicate that the Houthis will cease their offensive entirely. The Houthis have several operational incentives to consolidate control over the entire coastal plain south of Mokha.[60] The Houthis would benefit relatively little from potential control over Perim Island if Houthi forces do not establish and maintain a secure overland route along which to transfer weapons and supplies to the island via Ras Menheli.[61] Control over the entire coastal plain would provide the Houthis with ease of access and secure logistics routes to Perim Island, which the Houthis could use to develop a military presence capable of striking vessels at close range in the Bab al Mandeb Strait.[62]

Saudi and ROYG forces reportedly conducted airstrikes on Houthi forces in the southwestern Yemen campaign area on September 10 amid ROYG forces' likely efforts to regroup and prepare to recapture Mokha.[63] Houthi and Saudi media reported on September 10 that Saudi and ROYG-aligned forces struck Houthi forces moving along GLOCs between the Houthi-controlled mountains west of Taiz City and Mokha, as well as on roadways extending from Sanaa to southwestern Yemen.[64] ROYG military media warned civilians on September 10 to avoid roadways between Taiz City and Mokha and announced that ROYG-aligned forces will use "all types of weapons and air power" to establish a "kill zone" on the coastal plain in the vicinity of Mokha.[65] ROYG and Saudi forces do not appear to have attacked Mokha proper at the time of this writing, which suggests that ROYG forces likely intend to recapture the city. A retreating army is unlikely to destroy critical facilities that it intends and foresees a reasonable opportunity to recapture, particularly if that army depends upon the base significantly for military operations in the campaign area.

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

The Iranian regime appears to be increasing the readiness and rapid deployment capacity of its riot control and protest suppression forces, likely reflecting the regime's heightened concerns about renewed unrest. Islamic Revolutionary Guards Corps (IRGC)-affiliated Fars News reported on September 10 that the Greater Tehran Province IRGC Mohammad Rasoul Ollah Unit's special operation teams conducted an exercise that tested the forces' readiness to operate under different conditions.[66] Various Basij rapid response and riot control units, such as forces from the Imam Ali and Fatehin battalions, operate under the Mohammad Rasoul Ollah Unit.[67] These forces have supported major regime protest crackdowns, such as in 2009, 2019, 2022, and 2026.[68] Mohammad Rasoul Ollah Unit Commander Brigadier General Hassan Hassanzadeh stated on September 10 that the unit had moved beyond a defensive posture and organized offensive teams, units, and divisions for rapid special operations that could deploy to "any part of the country." [69] The Mohammad Rasoul Ollah Unit exercise is part of broader regime preparations for potential unrest. The regime is reportedly preparing to mobilize 313,000 participants in Tehran Province on September 18 for an internal security exercise, likely to demonstrate its capacity for large-scale mobilization amid concerns about renewed unrest.[70] The Mohammad Rasoul Ollah Unit's established protest suppression role and new emphasis on rapid nationwide deployment may indicate that the regime is increasing its readiness to quickly reinforce security forces during potential future unrest.[71]

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

See topline section.

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Iran Update, September 11, 2026



Parker Hempel, Carolyn Moorman, Adham Fattah, Benjamin Schmida, Bailey Pasternak, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

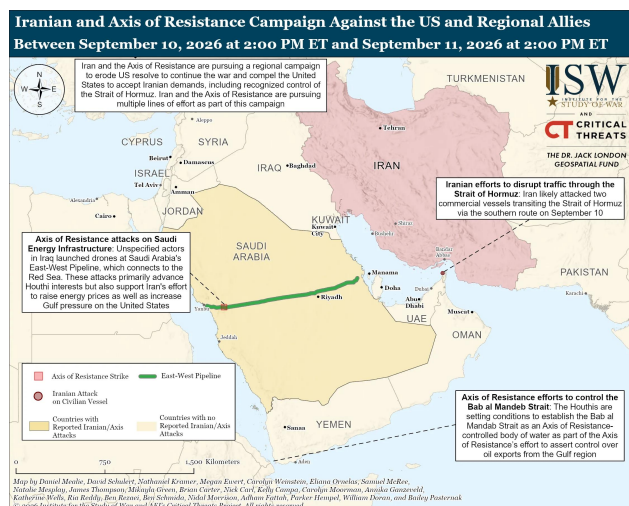
The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran. Most updates cover events from the past 24-hour period, whereas Monday updates also include events 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 Houthis are setting conditions to establish the Bab al Mandeb Strait as an Axis of Resistance-controlled body of water as part of the Axis of Resistance's effort to assert control over regional oil exports. Allowing the Houthis to consolidate control over the Bab al Mandeb would be unacceptable for US national security and economic interests.
2. Houthi officials and organizations have emphasized that the Houthis intend to maintain "safe" shipping in the Bab al Mandeb, but the Houthis' recent advances set conditions for the Houthis to be able to threaten shipping more easily if they decide it is in their interest to do so. Public Houthi statements may not necessarily reflect the Houthis' true intentions regarding the strait.
3. The Houthis' seizure of Yemen's Red Sea coast and Perim Island in the Bab al Mandeb Strait enables the Houthis to use a broader range of weapons systems to threaten shipping in the Bab al Mandeb. The Houthis could also use their new positions to deploy anti-shipping methods that the group deployed further away from shipping lanes in northern Yemen during the 2023-2025 Houthi campaign against international shipping.
4. The Houthis are conducting a coordinated effort with other Axis of Resistance members to coerce Saudi Arabia to meet Houthi demands by attacking Saudi energy infrastructure. The Saudi Foreign Ministry announced that an unspecified actor launched several drones from Iraq that struck the East-West Pipeline and nearby pumping stations south of Medina, Medina Province, on September 10.
5. The Shia Coordination Framework, which includes some Iranian-backed parties, is reportedly divided and considering several proposals to disarm Iranian-backed Iraqi militias amid US pressure and the nearing September 30 disarmament deadline. These options appear designed to enable the militias to maintain access to their weapons.

Toplines

The Houthis are setting conditions to establish the Bab al Mandeb Strait as an Axis of Resistance-controlled body of water as part of the Axis of Resistance's effort to assert control over regional oil exports. Allowing the Houthis to consolidate control over the Bab al Mandeb would be unacceptable for US national security and economic interests. The Houthis have further expanded their control of territory along Yemen's Red Sea coast and islands in the Red Sea since ISW-CTP's last data cutoff on September 10.[1] The Houthis seized control of the Greater and Lesser Hanish islands in the southern Red Sea, according to a Yemeni government official speaking to international media on September 11.[2] The Houthis had conducted attacks over several weeks to isolate Yemeni government forces on these islands.[3] The Houthis continued their advance south from Mokha Port, which the Houthis captured on September 10, to towns and positions closer to the Bab al Mandeb Strait.[4] Two Yemeni government officials told Reuters that the Houthis seized Dhubab, which had been the Yemeni government's last remaining port city on the Red Sea, on September 11.[5] A Houthi fighter posted a photo on September 11 outside the Dhubab council building, further indicating Houthi control over the city.[6] The Houthis also seized Perim Island, which is in the middle of the Bab al Mandeb Strait off the Yemeni coast's southwestern-most headland at Ras Menheli, according to Yemeni government officials speaking to international media.[7] The Houthis have also reportedly advanced into the coastal town of al Aradi, Lahij Governorate, across from Perim Island.[8]

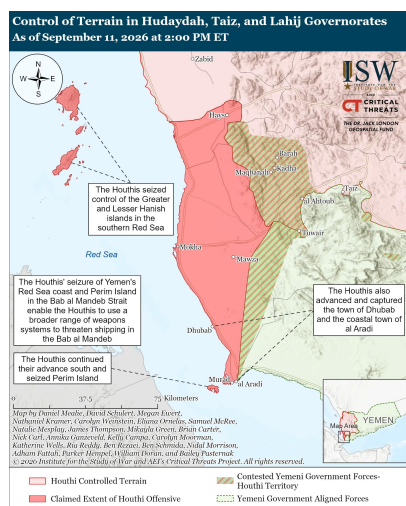


Houthi officials and organizations have emphasized that the Houthis intend to maintain “safe” shipping in the Bab al Mandeb, but the Houthis’ recent advances set conditions for the Houthis to be able to threaten shipping more easily if they decide it is in their interest to do so.[9] Public Houthi statements may not necessarily reflect the Houthis’ true intentions or future plans regarding the strait. The Houthis explicitly stated on September 11 that Saudi vessels are banned from transiting through the Bab al Mandeb as part of the group’s ongoing blockade of Saudi ports, for example.[10] The Houthis’ campaign against Saudi Arabia seeks to achieve four primary objectives, including ending Saudi military operations in Yemen, lifting the Saudi blockade of Houthi-controlled Yemeni ports and airports, coercing Saudi Arabia to pay Houthi civil servant salaries, and coercing Saudi Arabia to pay reparations to Yemeni civilians.[11] Allowing the Houthis to consolidate their new positions and establish control over the Bab al Mandeb would also give the Houthis unacceptable leverage over this critical waterway in future conflicts, beyond the current Houthi campaign against Saudi Arabia.

The Houthis’ seizure of Yemen’s Red Sea coast and Perim Island in the Bab al Mandeb Strait enables the Houthis to use a broader range of weapons systems to threaten shipping in the Bab al Mandeb. An unspecified Houthi commander in al Aradi told his subordinates that they could

position artillery along the newly captured Yemeni coastline to target shipping transiting through the Bab al Mandeb.[12] The commander may have been boasting about the Houthis' capabilities as part of a victory speech to his subordinates, but the Houthis' recent advances do put them within artillery range of the shipping lanes in the Bab al Mandeb. The Houthis possess a variety of self-propelled and towed artillery pieces, some of which possess an effective range of up to 17 kilometers.[13] Al Aradi is located approximately 16 kilometers from the center of the Bab al Mandeb. The Houthis' ability to use artillery to attack vessels passing through the strait would depend upon their ability to sustain logistics lines to their newly captured coastal territory, however.

The Houthis' new positions along the Red Sea coast—particularly on Perim Island—also place the Houthis in range to use tactical weapons systems, such as tactical drones. The Houthis could potentially use short-range drones or hexacopter drones that can drop various kinds of large or armor-piercing explosive devices to attack vessels.[14] The Houthis could also launch swarms of smaller, shorter-range drones to attack and harass shipping from these new positions closer to the Bab al Mandeb Strait. **Allowing the Houthis to consolidate positions that leave them in range to use tactical weapons against shipping lanes in the Bab al Mandeb is unacceptable for US national security interests.**



The Houthis could also use their new positions to deploy anti-shipping methods that the group deployed further away from shipping lanes in northern Yemen during the 2023-2025 Houthi campaign against international shipping. The Houthis do not currently possess the same military systems and infrastructure that Iran has developed over several decades to interfere with international shipping in the Strait of Hormuz. The Houthis have invested in developing their anti-shipping capabilities in recent years, however, which they successfully used to attack shipping in the Red Sea and Bab al Mandeb Strait during the group's campaign against international shipping between 2023 and 2025.[15] The Houthis used an unmanned surface vessel (USV) to attack shipping in the Red Sea for the first time in the October 7 War in January 2024 and subsequently regularly used USVs to attack vessels in that conflict.[16] The IRGC Quds Force has furnished the Houthis with explosive-laden drone boats in recent years, and the Houthis conducted their first waterborne IED attack on a Saudi naval frigate in January 2017.[17] The Houthis also demonstrated the ability to board vessels during the October 7 War. The Houthis hijacked an Israeli-owned, Japanese-operated freighter in November 2023 after Houthi fighters fast-roped onto the deck of the vessel from a helicopter.[18] The Houthis conducted these attacks against international shipping while based in the Houthi-controlled Hudaydah Port, which is located nearly 250 kilometers north of the Bab al Mandeb Strait.[19] The Houthis' recent advances enable the Houthis to position weapons systems within a much closer range of the strait and thus enable the Houthis to pose a greater threat to international shipping. The Houthis will likely not be able to attack shipping immediately, but the Houthis are setting conditions to be able to do so if they're allowed to

consolidate their positions and decide it advances their interests to attack shipping.

The Bab al Mandeb is narrower than the Strait of Hormuz, and there is therefore little prospect of establishing a secure transit route off the coast of Africa similar to the US-sponsored alternative transit route off the coast of Oman in the Strait of Hormuz. The Bab al Mandeb Strait from Perim Island to Djibouti's coast is approximately 29 kilometers wide.[20] The Strait of Hormuz is 39 kilometers at its narrowest point.[21] The United States has helped facilitate traffic through an alternative route off the coast of Oman in the Strait of Hormuz that enables vessels to transit the strait without having to use Iran's illegal traffic separation scheme. The Bab al Mandeb's narrowness will likely preclude the establishment of a similar secure route in that waterway.

The Houthis' ability to threaten shipping in the Bab al Mandeb offers Iran an alternative way to disrupt global energy markets while Iran appears to be facing difficulties disrupting shipping in the Strait of Hormuz. United Kingdom Maritime Trade Operations reported on September 10 that four unspecified projectiles hit two vessels transiting the strait through the US-sponsored southern transit route.[22] These likely Iranian strikes are part of the regime's effort to prevent international traffic through the southern route, which undermines Iranian control of the strait. The regime appears to be facing difficulties in disrupting traffic, however.[23] Maritime data tracking firm Tanker Trackers reported on September 11 that ten million barrels per day of oil are leaving the strait for the first time since July, highlighting Iran's difficulty in stopping the flow of oil out of the strait.[24] Houthi control over the Bab al Mandeb thus gives Iran an alternative way to pressure energy markets and impose economic costs on the United States and its regional allies. Iranian regime media argued on September 11 that the Houthi offensive near the Bab al Mandeb Strait gives the Houthis "veto power" along a critical maritime route by raising shipping risks, insurance costs, and military resource demands without the use of a large naval fleet.[25]

The Houthis are conducting a coordinated effort with other Axis of Resistance members to coerce Saudi Arabia to meet Houthi demands by attacking Saudi energy infrastructure. The Saudi Foreign Ministry announced that an unspecified actor launched several drones from Iraq that struck the East-West Pipeline and nearby pumping stations south of Medina, Medina Province, on September 10.[26] The Saudi Energy Ministry announced on September 11 that Saudi Arabia shut down the East-West Pipeline as a precaution following the attack as engineering teams conducted repairs and assessed the damage.[27] The attack was almost certainly conducted by either the Houthis or Iranian-backed Iraqi militias. The Houthis are able to launch attacks on Saudi Arabia from Iraq because Iranian-backed Iraqi militias allow the Houthis to operate in areas that the militias control. The Houthis have increasingly coordinated with the Islamic Revolutionary Guards Corps (IRGC) and Iraqi militias to attack Saudi Arabia since July 28, when the Houthis attacked Saudi oil infrastructure from Iraqi territory in coordination with the Iraqi militias and under IRGC supervision.[28]

A prolonged shutdown of the East-West Pipeline could put further pressure on Saudi Arabia's ability to export oil. Saudi Arabia has increasingly relied on the East-West Pipeline to transport oil to Yanbu, on Saudi Arabia's Red Sea coast, to circumvent Iran's control over the Strait of Hormuz.[29] Saudi Arabia can presumably repair the East-West Pipeline relatively quickly. The Axis of Resistance would need to conduct sustained attacks against the pipeline to render it inoperable. Saudi Arabia would need to provide counter-drone defenses across the entire length of the 1,200-kilometer-long pipeline in order to defend it if the Axis of Resistance conducted sustained attacks, given that damage to a single segment along the pipeline would render the entire pipeline inoperable.[30] The deployment of counter-drone systems across 1,200 kilometers of Saudi territory to defend the pipeline would be a very resource-intensive process for Saudi Arabia.

The Shia Coordination Framework, which includes some Iranian-backed parties, is reportedly divided and considering several proposals to disarm Iranian-backed Iraqi militias amid US pressure and the nearing September 30 disarmament deadline. These options appear designed to enable the militias to maintain access to their weapons. Iraqi sources told US-funded, Arabic-language media on September 10 that some unspecified framework members want the Iraqi militias to surrender their weapons to the Iranian-backed Popular Mobilization Forces (PMF).[31] This option would probably entail the militias handing over their weapons to militia-controlled PMF brigades that answer to Iran and operate outside of formal PMF channels. The Iraqi sources said that both Kataib Hezbollah and Harakat Hezbollah al Nujaba have rejected this option. Both groups have previously resisted disarmament on ideological grounds.[32] Both militias, as well as Badr Organization head Hadi al Ameri and other unspecified framework parties, instead support “regulating” militia weapons.[33] The ambiguity of the rules that would govern this “regulation” and how they would be enforced suggests that this proposal is intended to enable the militias to retain their weapons and use them at will. Kataib Hezbollah and Harakat Hezbollah al Nujaba’s support for this policy option, given both militias’ continued refusal to disarm, further indicates that this option would do little to affect the militias’ armament.[34] The framework is also discussing a plan to transfer weapons, particularly long-range missiles, to Iran for storage, according to informed sources speaking to Saudi media on September 9.[35] Iran has provided its Iraqi partners with weapons, including missiles and drones, for years, including during the US-Israel-Iran War.[36] Iran would probably just transfer weapons stored in Iran back to the militias at a later point if the framework chose this policy option. None of the framework’s current options, as reported by regional media, appear to meet US expectations for the Iraqi government’s disarmament of the militias.[37]

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

Iranian President Masoud Pezeshkian attended a BRICS summit in New Delhi, India, on September 11 amid Iran’s dire economic situation.[38] Iran views BRICS, which is an international

economic coalition comprised of the People's Republic of China, Russia, and others, as crucial to undermining international sanctions and the US dollar-based financial system.[39] Pezeshkian met with Indian Prime Minister Narendra Modi at the summit.[40] Pezeshkian's attendance at the BRICS summit comes after a flurry of Iranian activity at multilateral organizations. Pezeshkian held meetings with world leaders at the Shanghai Cooperation Organization (SCO) summit in Bishkek, Kyrgyzstan, on August 31 and September 1, for example.[41] Judiciary Chief Gholam Hossein Mohseni Ejei also traveled to India on September 3 to attend the BRICS Chief Justices' summit to discuss international trade.[42]

These Iranian engagements with multilateral institutions come amid Iran's struggling economy and the United States' economic pressure campaign on Iran. The US Treasury Department sanctioned a network of firms and individuals across Iraq, Lebanon, Turkey, and the United Arab Emirates on September 11 for aiding Lebanese Hezbollah and Iranian-backed Iraqi militia Kataib Hezbollah, two of Iran's proxies, and helping launder money to Iran.[43] Iran has historically used the Iraqi economy to fund itself and the Axis of Resistance.[44] *Bloomberg* separately reported on September 11 that Iran's oil exports fell 74 percent in August to 247,000 barrels per day due to the US naval blockade on Iranian ports.[45] Iran also continues to suffer from gasoline shortages, high unemployment, and high inflation, all of which encourage Iranian officials to seek ways to generate revenue through multilateral engagement.[46]

Lebanon

The Lebanese Armed Forces (LAF) deployed to unoccupied Nabatieh City, Nabatieh Governorate, on September 8 after the Israel Defense Forces (IDF) cleared nearby Ali al Taher on September 3 and conducted dozens of airstrikes in the surrounding area.[47] The IDF had not previously deployed to Nabatieh.[48] It is unclear whether the LAF communicated its deployments to the US-led Military Coordination Group for Lebanon, which is designed to deconflict IDF and LAF activities in Lebanon.[49] Lebanese President Joseph Aoun stated in a meeting with Lebanese security officials on September 9 that the LAF's deployments to Nabatieh are intended to prevent future IDF attacks in the area.[50] The IDF last struck Nabatieh on September 6, prior to LAF deployments to the city.[51] The IDF has continued to target Hezbollah fighters and infrastructure in Nabatieh's immediate surroundings, however.[52] The IDF also demolished the tunnels beneath Ali al Taher on September 10.[53] Israeli security officials stated on September 11 that the IDF will remain in southern Lebanon until Hezbollah is completely disarmed throughout Lebanon.[54]

Iraq

Iranian-backed Iraqi militias are attempting to pressure the Iraqi federal government to disarm other armed actors in Iraq, likely to try to turn the government's attention to other armed groups amid the government's focus on disarming Iranian-backed Iraqi militias. A source close to the Shia Coordination Framework's negotiations with the militias told Iraqi media on September 11 that the militias want the federal government to draft a law that addresses all forms of weapons outside of state control and doesn't limit its application to Shia groups.[55] The source added that a new committee, comprised of unspecified individuals, will draft a law on restricting, regulating, and managing weapons.[56] It is unclear how this law will differ from current Iraqi law that prohibits armed groups from operating outside of the state.[57] The source said that the law will cover tribal formations throughout Iraq and the Kurdistan Workers' Party (PKK).[58] The Islamic Resistance in Iraq, which is a coalition of Iranian-backed Iraqi militias, similarly called on August 17 for the federal government to disband the Iraqi Kurdish Peshmerga as a precondition for discussing militia disarmament with the

government.[59]

Arabian Peninsula

The Houthis likely attempted to utilize US-based AI software to support the development of their ballistic missile and rocket software.[60] There is no evidence that the Houthis used this AI software to domestically produce an operational weapon, however. AI research company Anthropic reported on September 10 that unidentified actors in Houthi-controlled northern Yemen—almost certainly the Houthis—used Claude AI to develop guidance software for three advanced weapons systems, including guided rockets, a multistage ballistic missile with a 2,000-kilometer range, and the multivariant “R2000 missile,” which includes a hypersonic glide vehicle variant.[61] Anthropic said the actors conducted a live rocket test and later used Claude AI to diagnose a launch failure but found no evidence that the actors produced an operational weapon.[62] Anthropic confirmed that it banned the actors’ Claude AI accounts but added that the actors developed offline simulation tools that enabled them to continue developing guidance software without access to Claude AI or engineering software.[63] The Houthis lack the capacity to develop advanced weapons such as guided rockets and drones domestically and instead locally assemble drones and ballistic missiles from components largely smuggled into Yemen by the Islamic Revolutionary Guards Corps, according to the US Government and weapons experts.[64] The Houthis therefore likely sought to use Claude AI to improve the guidance systems of domestically assembled but Iranian-produced weapons systems. If the Houthis successfully improved the guidance software of these systems, they would likely be able to transfer that software to Iran with relative ease.

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