

Iran Update, September 14, 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. Iran's apparent challenges in consolidating control over the Strait of Hormuz are likely driving the regional campaign that Iran is currently waging against the United States and its allies in the region. Iran's proposal for the management of the strait, which attempts to formalize Iranian control in the strait, has generated significant resistance from other Persian Gulf littoral states. Iran is also attempting to overcome current operational constraints on its ability to control shipping in the Strait of Hormuz.
2. Iranian regime media notably acknowledged that Iran's control over the strait may be waning on September 14, which suggests that some factions within the regime recognize how Iran's current constraints are impacting its ability to achieve its positive objectives.
3. Yemeni government-aligned forces appear to have halted Houthi advances south along Yemen's Red Sea coastal plain since September 11. Sustained Houthi control of Dhubab, Mokha, and the Hanish Islands preserves the Houthis' ability to threaten international shipping in the Red Sea.
4. The Iraqi federal government has taken some recent steps to show that it is taking the threat posed by Iranian-backed Iraqi militias to other countries seriously, including closing border crossings with Iran. These actions are unlikely to stem the flow of Iranian arms to Iranian-backed Iraqi militias that the militias are using to conduct attacks on US regional assets and US allies as a part of Iran's broader campaign in the US-Iran conflict.
5. Iran is also reportedly prioritizing newly-formed, IRGC-directed Iraqi militia cells over Iran's historic Iraqi partners to conduct operations against the United States and its allies in the region. Iran may be prioritizing support for these new militia cells due to command-and-control issues that Iran has reportedly faced with some of its historic Iraqi partners. Some Iraqi militias appear dissatisfied with Iran's development of new networks in Iraq, however.

Toplines

Iran's apparent challenges in consolidating control over the Strait of Hormuz are likely driving the regional campaign that Iran is currently waging against the United States and its allies in the region. Iran was required, under the memorandum of understanding (MoU), to negotiate an arrangement for the Strait of Hormuz with Oman.[1] Iranian Foreign Affairs Minister Abbas Araghchi stated that he was supposed to meet with Gulf officials in Oman on September 14 to present a formal plan for Iranian management and tolls in the strait with some Omani involvement.[2] Iran's proposal, which attempts to formalize Iranian control in the strait, has generated significant resistance from other Persian Gulf littoral states. Bahrain refused to participate in the meeting until Iran stopped attacking regional energy infrastructure and both states restored relations, for example.[3] Saudi Arabia reportedly submitted amendments to Iran and Oman's proposal over concerns that the proposed language could establish an unacceptable new status quo in the waterway, according to a Gulf official speaking to Axios.[4] The official is likely referring to Saudi objections over clauses that allow for Iran to selectively charge tolls against countries it deems hostile.[5] Saudi Arabia requested the indefinite postponement of the meeting, according to Iranian Foreign Affairs Ministry spokesperson Esmail Baghaei.[6] Baghaei implied that Saudi Arabia's opposition to the meeting was over recent Houthi strikes against Saudi critical infrastructure and military bases.[7] Oman, Iran's most amiable regional partner, also continues to oppose Iran's proposal for "mandatory fees" in the strait. Omani Foreign Affairs Minister Badr Al Busaidi confirmed on September 14 that the meeting was postponed in the interest of consensus.[8]

Iran is also attempting to overcome current operational constraints on its ability to control shipping in the Strait of Hormuz.[9] 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.[10] The Islamic Revolutionary Guards Corps (IRGC) Navy falsely claimed on September 14 that a Panama-flagged vessel struck a mine as the vessel transited the strait's southern route on September 12.[11] US Central Command (CENTCOM) rejected this claim and stated that Iranian forces fired a drone targeting a different stationary vessel off the coast of Oman.[12] The IRGC has repeatedly issued claims such as this in order to falsely imply that the strait retains a significant number of mines in the wake of CENTCOM's announcement in late August that US forces had cleared mines in the strait.[13] Iranian regime media notably acknowledged that Iran's control over the strait may be waning on September 14, which suggests that some factions within the regime recognize how Iran's current constraints are impacting its ability to achieve its positive objectives.[14] IRGC-affiliated outlet Tasnim News Agency argued that the recent increase in the transit of oil through the strait calls into question the degree of Iran's control over Iran's primary economic and strategic leverage.[15]

The Iranian regime also aims to degrade the United States' will to maintain the US naval blockade by attacks on US allies in the region and driving up oil prices as part of this campaign. The *New York Times*, citing Iranian and IRGC officials, reported on September 13 that Iranian officials have debated two primary ways to break the US naval blockade: return to negotiations or intensify attacks on US targets and commercial vessels, thereby raising oil prices.[16] The military approach that the *New York Times* described is consistent with ISW-CTP's assessment on September 4 that Iran's attacks on US naval forces may have reflected Iranian decisionmakers' dissatisfaction with the trajectory of the war.[17] CENTCOM stated on September 13 that its forces have redirected 101 Iranian or Iran-affiliated commercial vessels as part of the US naval blockade, which continues to adversely affect Iran's economy.[18]

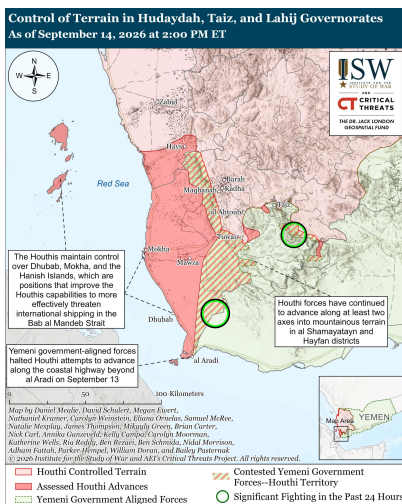
Yemeni government-aligned forces appear to have halted Houthi advances south along Yemen's Red Sea coastal plain since September 11. The Houthis have retained territory that can facilitate more effective Houthi targeting of shipping in the Red Sea. Recent direct fire engagements between Houthi and Yemeni government-aligned forces near Jabal Kahbub, which is

located 30 kilometers inland from the Red Sea along the border between Taiz and Lahij governorates, indicate that government forces have halted Houthi attempts to advance further east along the coastal highway beyond the town of al Aradi.[19] The Houthis advanced into al Aradi, which is located along a peninsula that juts out in the Bab al Mandeb, on September 11.[20] Saudi or Yemeni government airstrikes have also contributed to the stabilization of Houthi-Yemeni government frontlines along the coastal plain near al Aradi. Yemeni government-aligned forces designated an area to coordinate fire against Houthi targets near Mocha and Dhubab cities on September 10 and have struck numerous Houthi frontline positions and supply lines between Mocha and Dhubab.[21] Airstrikes targeting the Houthis have inflicted “heavy casualties” and forced Houthi forces to redeploy along Yemen’s western Red Sea coast, according to Emirati media.[22]

The Houthis appear to have retained control over the majority of Yemen’s Red Sea coast. Sustained Houthi control of Dhubab, Mokha, and the Hanish Islands preserves the Houthis’ ability to threaten international shipping in the Red Sea. A DC-based Yemen analyst with sources in the internationally recognized Yemeni government told Emirati media on September 14 that Yemeni government-aligned forces have yet to fully secure territory along the Red Sea coast despite continued air support.[23] A London-based Yemen analyst reported that the Houthis withdrew from Perim Island on September 13.[24] ISW-CTP is unable to verify this claim as of this writing.

The Houthis may be attempting to outflank Yemeni government-aligned forces along the coastal plain by advancing south towards the Bab al Mandeb through Taiz Governorate’s mountainous terrain in southwestern Yemen. Direct fire engagements between the Houthis and Yemeni government-aligned forces near Jabal Khabub may reflect Houthi efforts to utilize mountainous terrain north of al Aradi in order to outflank Yemeni government-aligned forces near al Aradi. The mountainous terrain near Jabal Khabub could protect Houthi advances along the open coastal areas east of al Aradi from airstrikes or artillery fire. A Yemeni security source suggested to Emirati media on September 14 that the Houthis are operating in the mountains to “minimize their visible human presence” to avoid Saudi or Yemeni government-aligned airpower in the open coastal plain.[25] Saudi airstrikes on Houthi positions in open terrain since 2009 have forced Houthis to rely on mountainous terrain and terrain concealed by vegetation for movement.[26]

Houthi forces have advanced in areas of western and eastern Taiz Governorate near a Yemeni government-aligned ground line of communication (GLOC) that connects Taiz City and Aden City. Houthi forces have continued to advance east from al Waziyah District into al Shamayatan District since September 9, according to a DC-based Yemen analyst.[27] The Houthis also advanced westward beyond Hayfan City toward Bani Gazyi on September 14, according to Saudi media and a US-based Yemen analyst citing Yemeni government sources.[28] Houthi forces have recently infiltrated government-held areas in western Yemen by scaling steep mountainous terrain to attack isolated defensive positions in support of Houthi advances.[29] A US-based Yemen analyst Mohammad al Basha assessed that recent Houthi advances in Taiz Governorate could threaten Yemeni government-aligned supply lines in al Turbah, a town which connects Taiz City to Aden City.[30]



The Houthis conducted additional attacks against Saudi energy and military infrastructure since September 11 as part of their ongoing effort to coerce Saudi Arabia to meet Houthi demands. The Houthis' attacks against Saudi energy and oil infrastructure seek to coerce Saudi Arabia to submit to the Houthis' four primary objectives: 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.[31] The Saudi Civil Defense issued numerous early warning alerts for Houthi projectiles over Abha, Khamis Mushait, Sharurah, and Taif in southwestern Saudi Arabia between September 11 and 14.[32] The Houthis claimed to launch drones and missiles targeting Saudi aircraft hangars, radar installations, runways, and ammunition depots at the King Khalid Air Base in Khamis Mushait on September 14.[33] Houthi officials have repeatedly stated in recent days that accepting Houthi demands for "peace" will be a less costly option for Saudi Arabia than further Houthi attacks.[34] The Houthis warned on September 14 that the group would respond to additional Saudi airstrikes launched from Khamis Mushait and Taif on September 14.[35]

The Iraqi federal government has taken some recent steps to show that it is taking the threat posed by Iranian-backed Iraqi militias to other countries seriously, including closing border crossings with Iran. These actions are unlikely to stem the flow of Iranian arms to Iranian-backed Iraqi militias that the militias are using to conduct attacks on US regional assets and US allies as a part of Iran's broader campaign in the US-Iran conflict. Likely Axis of Resistance-affiliated actors based in Iraq struck Saudi Arabia's East-West Pipeline and nearby pumping stations south of Medina, Medina Province, with a drone on September 10.[36] It is unclear if Iranian-backed Iraqi militias, Houthi fighters, or another actor conducted the attack. Saudi Arabia and unspecified regional partners reportedly assessed that the Houthis attacked Saudi Arabia in late July from Iraqi territory in coordination with the Iraqi militias and the IRGC.[37] Saudi Arabia announced that it will refrain from immediately responding to the attacks and would allow the Iraqi federal government to address the militias first.[38] An initial Iraqi federal government investigation into the September 10 attack accused Iranian-backed Iraqi militias of launching the drones from positions near the Iran-Iraq border in the desert of Maysan Province.[39] Iraqi army and Iranian-backed Popular Mobilization Forces (PMF) sources speaking to UK-based, Qatari media on September 13 similarly observed that the majority of attacks that Iranian-backed Iraqi militias have launched from Iraq in recent months originated from positions near the Iran-Iraq border.[40] Iran has smuggled various weapons, including missiles and drones, to its Iraqi partners through the Iran-Iraq border for decades, especially during the US-Israel-Iran War.[41]

The Iraqi federal government closed three Iran-Iraq border crossings on September 12 in response to the militia attacks in order to collect intelligence and determine the "violations and breaches" that occurred

at the crossings.[42] The Iraqi federal government has already re-opened one of the southern crossings at Shalamchah and is expected to re-open the others later this week.[43] The Iraqi federal government's closure of these border crossings is unlikely to actually meaningfully stem the flow of weapons that Iran smuggles to the militias, given the years that Iran has invested in establishing smuggling networks that operate outside of official Iran-Iraq border crossings.

Iraqi Prime Minister Ali al Zaydi also launched an investigation into the Iraqi Army Maysan Operations Command that is responsible for the area from which the drone was launched.[44] Zaydi dismissed the Maysan provincial police chief.[45] It is unclear how effective these actions will be, given the extent to which Iranian-backed Iraqi actors in the Iraqi federal government and security establishment have previously interfered with Zaydi's efforts to hold the militias accountable.[46]

The Iraqi federal government's attempts to thwart militia activity come amid continued reports of coordination between the Iraqi militias and the Houthis as a part of Iran and the Axis of Resistance's regional campaign against the United States and its allies. Unspecified sources told Iraqi media that unspecified actors, likely referring to the Iraqi militias and the Houthis, have reactivated a coordination mechanism between Axis of Resistance actors with the purpose of ending the "siege" on Iran by striking Gulf states.[47] The sources said that the coordination mechanism was initially formed in 2025 as part of a plan to overthrow the Syrian government.[48] The Houthis and Iraqi militias are already cooperating, as evidenced by Saudi and US airstrikes on Iraqi militia targets in late July that killed a senior Houthi member.[49] The Houthis also recently opened a new operational headquarters in an Iraqi militia stronghold.[50]

Iran is also reportedly prioritizing newly formed, IRGC-directed Iraqi militia cells over Iran's historic Iraqi partners to conduct operations against the United States and its allies in the region. Two commanders from unspecified Iranian-backed Iraqi militias and one commander affiliated with the Islamic Resistance in Iraq told UK-based, Qatari media on September 13 that a small armed network operating under the command of senior IRGC Colonel Hamed Abdollahi has conducted multiple drone attacks in recent months.[51] The Islamic Resistance in Iraq is an Iraqi militia coalition that includes Kataib Hezbollah, Kataib Sayyid al Shuhada, Harakat Hezbollah al Nujaba, and Ansar Allah al Awfiya.[52] The United States sanctioned Abdollahi in 2011 for his part in the attempted assassination of then-Saudi Ambassador to the United States.[53] Saudi-owned, UK-based media described Abdollahi as IRGC Quds Force Commander Brigadier General Esmail Ghaani's assistant for Iraq affairs.[54] The militia commanders said that Abdollahi's armed network has conducted drone attacks targeting multiple sites in Erbil in Iraqi Kurdistan and at a former US base in Syria in March 2026.[55] This network also reportedly conducted the May 17 drone attack on the UAE's Barakah power plant, the July 27 drone attacks on Saudi Arabia's oil facilities, and the September 11 attack on Saudi Arabia's East-West oil pipeline.[56] One militia commander added that Abdollahi has directed all available resources from existing militias to support his network and, in doing so, has given his network more resources than what Iran has provided to all "key" Iraqi militias "combined." [57] Western media has reported in recent months on Iran's use of IRGC-managed cells to conduct attacks but has not indicated that Iran is enabling some groups at the exclusion of others.[58]

Iran may be prioritizing support for these new militia cells due to command-and-control issues that Iran has reportedly faced with some of its historic Iraqi partners. Iranian-backed Iraqi militia Asaib Ahl al Haq attempted to assassinate former Prime Minister Mustafa al Khadimi in 2021, almost certainly against Iran's orders, for example.[59] Iran has also pushed some of its unspecified Iraqi partners to focus on Iraqi politics and state capture instead of military operations in recent months, according to UK-based Amwaj media, possibly to obfuscate its involvement with the militias and reduce the risk of US sanctions on Iraq.[60] An Iraqi militia source said that Iran may instead support the

military capabilities of new, non-PMF-affiliated militias instead.[61] Iran prioritizing the armament of these new networks supports this source's hypothesis.

Some Iraqi militias appear dissatisfied with Iran's development of new networks in Iraq. The three unspecified Iraqi militia commanders speaking to UK-based, Qatari media on September 13 described the members of Abdollahi's network as "defectors, dissidents, and double agents." [62] The commanders also said that the Iraqi militias have lost trust in the channels that link them to the IRGC.[63] The militia commanders specifically attributed much of their mistrust to Abdollahi.[64] The militia commanders noted that the relationship originally soured after the militias refused Abdollahi's request for the militias to deploy to Syria to defend the Assad regime in Fall 2024.[65] The militias also blamed Abdollahi for creating inter-militia rifts when he ordered the militias to back former Prime Minister Mohammad Shia al Sudani for a second term, reportedly against the wishes of former Supreme Leader Ali al Khamenei.[66] The militia commanders said that current Supreme Leader Mojtaba Khamenei was to replace Abdollahi when Mojtaba entered office, but Abdollahi instead now reports directly to Ghaani. The commanders said that Abdollahi no longer needs Ghaani's approval to act, which implies that Abdollahi has been acting under Ghaani's orders until more recent days.[67] It is unclear if the views of these militia commanders reflect those held by all, or most of the Iraqi militias, however.

Iran's support for militia attacks and Baghdad's efforts to thwart these developments come as the United States continues to apply extreme financial pressure on the Iraqi federal government to disarm the Iraqi militias by September 30.[68] Two Iraqi government sources told Iraqi Kurdish news on September 14 that the United States warned Baghdad during Zaydi's July 2026 visit to Washington, DC, that the United States could suspend monthly dollar transfers to the Iraqi federal government if the Iraqi militias do not surrender their weapons by September 30.[69] The Iranian-backed Iraqi militias that are closest with Iran and have been the most kinetically active notably continue to refuse to disarm.[70] Other Iranian-backed Iraqi militias are actively circumventing the federal government's attempts to disarm them, including by handing over inoperable weapons.[71] The United States cut off Iraq's access to its oil revenue, which sits in the US Federal Reserve, in April 2026 due to militia activity and only fully resumed the dollar shipments in July 2026.[72] About 90 percent of Iraq's state budget comes from its oil revenue.[73]

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

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

See topline section.

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Endnotes

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Iran Update, September 15, 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.

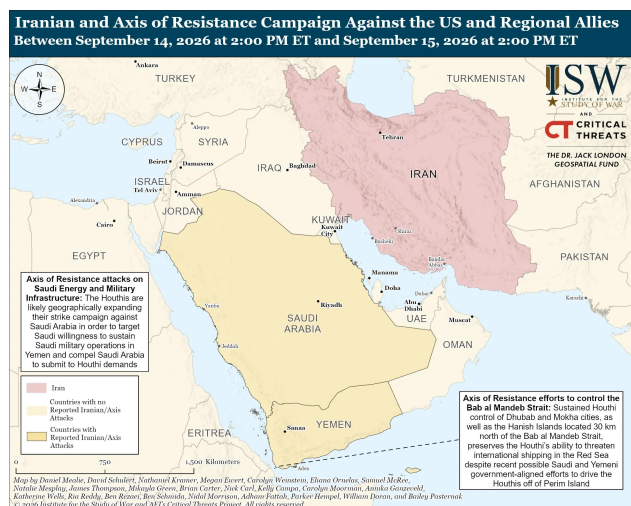
Key Takeaways

1. The Houthis are likely expanding their strike campaign into Saudi Arabia to erode Saudi support for military operations in Yemen and compel Riyadh to accept Houthi demands.
2. The Houthis' likely expansion of attacks farther into Saudi Arabia may be tied to recent Saudi efforts to reroute oil exports through the Strait of Hormuz.
3. Saudi Arabia's ability to increase oil exports through the Strait of Hormuz may reflect recent US successes in US efforts to restore freedom of navigation to the strait.
4. Several current and former Iranian officials who spoke to the New York Times on September 13 are likely advancing an Iranian information operation that seeks to preserve negotiations with the United States by distancing senior regime decision-makers from responsibility for Iranian attacks in the Strait of Hormuz in early July 2026.
5. Iranian officials' accounts of regime decision-making confirm that hardline actors remain the principal decision-makers within the regime. These actors have demonstrated their willingness to risk military conflict with the United States in order to achieve key Iranian objectives, such as retaining Iranian control over the strait.

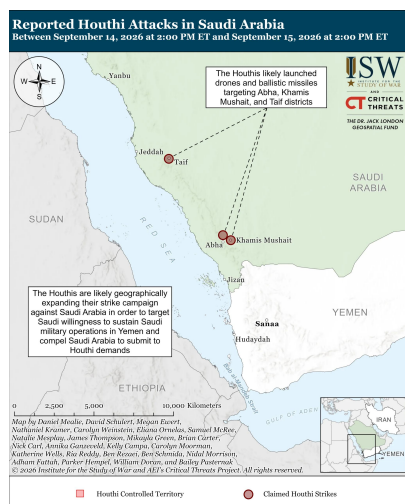
Toplines

The Houthis are likely expanding their strike campaign into Saudi Arabia to erode Saudi support for military operations in Yemen and compel Riyadh to accept Houthi demands. The Saudi Civil Defense issued more early warning attack alerts in a single 24-hour period between September 14 and 15 than in any other such period since the start of the Houthi blockade in late July 2026.[1] The Saudi Civil Defense issued warnings over several Saudi towns and districts that the Houthis have attacked in recent days, including Najran, Khamis Mushait, Abha, and Jizan districts.[2] The Saudi

coalition spokesperson Major General Turki al Maliki announced on September 14 that the Houthis launched “a number” of ballistic missiles and drones at Khamis Mushait, Abha, and Taif districts, injuring 13 civilians and damaging seven houses.[3] The civil defense agency also issued alerts for areas farther north along Saudi Arabia’s Red Sea coast that the Houthis have rarely, if ever, targeted under this current campaign, including Yanbu, Jeddah, al Ula, and Mecca.[4] The Saudi Civil Defense did not confirm whether the Houthis conducted strikes targeting the locations under alert, but the alerts suggest that the agency detected a legitimate threat from incoming Houthi munitions.



The likely geographic expansion of Houthi attacks follows repeated Houthi warnings that the Houthis will continue to expand their strikes on Saudi Arabia until Saudi Arabia ends its military operations in Yemen.[5] The director of the Houthis’ military media center directly threatened on September 14 that the Houthis will strike Jeddah, Yanbu, and more distant targets.[6] The director warned that Houthi strikes will only cease when Saudi Arabia ceases its attacks on Yemen.[7] Houthi political council member Hezam al Asad similarly warned Saudi Arabia on September 14 that the Houthis will continue to respond and “escalate” against Saudi Arabia as long as Saudi Arabia continues its “aggression” against Yemen.[8] Saudi Arabia has likely conducted airstrikes since late July to support Saudi-backed Yemeni government forces, prevent the Houthis’ consolidation along Yemen’s western coast, and halt advances along the southern coastal plain and in Taiz Governorate (see below).[9] Ending Saudi military operations in Yemen is one of the Houthis’ four primary objectives at this time, which also include lifting the Saudi blockade of Houthi-controlled Yemeni ports and airports, securing Saudi support for Houthi civil servant salaries, and securing Saudi reparations to Yemeni civilians.[10]



The Houthis' likely expansion of attacks farther into Saudi Arabia may be tied to recent Saudi efforts to reroute oil exports through the Strait of Hormuz. US Energy Secretary Chris Wright told Western media on September 15 that the US military is supporting Saudi efforts to increase oil exports through the Strait of Hormuz as Saudi Arabia diverts oil away from the East-West Pipeline.[11] Saudi Arabia is currently repairing this pipeline, which shut down after Axis of Resistance-affiliated actors based in Iraq struck the pipeline and pumping stations south of Medina with a drone on September 10.[12] A US official told Axios on September 15 that Saudi Arabia has “significantly” increased the number of oil tankers that it is sending through the Strait of Hormuz as fighting with the Houthis has intensified.[13] Saudi Arabia’s commitment and ability to send shipments through the Strait of Hormuz limit Houthi leverage over Saudi oil exports. The Houthis have previously adapted their tactics to maintain pressure on Saudi Arabia when Saudi Arabia has adjusted its oil export routes, including by shifting from efforts to disrupt Red Sea shipping to direct Houthi attacks on Saudi oil infrastructure after Saudi Arabia began to divert shipments through the Suez Canal to avoid the Bab al Mandeb.[14]

Saudi Arabia’s ability to increase oil exports through the Strait of Hormuz may reflect recent US successes in efforts to restore freedom of navigation to the strait.[15] US officials told Axios that an average of 40 vessels and 14 million barrels of oil reportedly transited through the strait per day under US military guidance and protection with the support of Gulf allies.[16] 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, and recent US demining operations in the strait have removed a key intimidation mechanism that Iran has used to divert vessels into its own territorial waters.[17] ISW-CTP has observed that Iran appears to be facing several operational constraints that are limiting its ability to control shipping through the strait, including constraints on its mine-laying capabilities and targeting cycles.[18]

The constraints on Iran’s ability to enforce its control over the strait at this time appear to have driven Iran’s decision to launch its wider regional campaign to compel the US and its allies to surrender to Iranian demands, which include Iranian management of the Strait of Hormuz.[19] These constraints have limited Iran’s ability to achieve its positive strategic objective of securing sovereignty over the Strait of Hormuz. Iranian decision-makers continue to appear dissatisfied with the trajectory of the conflict and are trying to change it through a broader regional campaign that includes Iranian-backed Axis of Resistance attacks on regional US allies such as Saudi Arabia.[20] Houthi efforts to consolidate control over the Bab al Mandeb and Yemen’s Red Sea coastline are also a component of this campaign that aims to increase oil prices and, therefore, pressure on the United States to surrender.[21]

Saudi Arabia is intensifying diplomatic efforts to secure international support to address Houthi threats to international shipping and energy markets. Saudi Crown Prince Mohammad bin Salman (MBS) met US Central Command (CENTCOM) Commander Admiral Brad Cooper in Riyadh on September 14 to discuss “regional developments,” which almost certainly included Houthi attacks in Saudi Arabia, the Houthi offensive in Yemen, and current US military support for Saudi Arabia.[22] The United States is reportedly providing air defense, targeting data, and intelligence support on the ground to forces in Saudi Arabia.[23] MBS also discussed security cooperation and freedom of navigation in the Red Sea with Egyptian officials in Cairo on September 15.[24] Saudi engagement with key allies takes place as Saudi officials request further support from the United States, United Kingdom, and other European countries in combatting the Houthis and Iranian-backed Iraqi militias.[25] Three unspecified officials told a DC-based Yemen analyst that US Secretary of State Marco Rubio called on Oman to pressure the Houthis to halt their attacks on Saudi Arabia and prevent further escalation in a call with Omani Foreign Minister Badr al Busaidi on September 15.[26] A source with knowledge of the matter told Axios on September 15 that Israel and Saudi Arabia are discussing the possibility of Israel providing

intelligence support to the Saudis in their fight against the Houthis that would resemble Israel's current intelligence support relationship with the United Arab Emirates.[27]

Several current and former Iranian officials who spoke to the *New York Times* on September 13 are likely advancing an Iranian information operation that seeks to preserve negotiations with the United States by distancing senior regime decision-makers from responsibility for Iranian attacks in the Strait of Hormuz in early July 2026.[28] Eight Iranian officials, three Islamic Revolutionary Guards Corps (IRGC) members, and four former Iranian officials described the circumstances under which Iran attacked three vessels in the Strait of Hormuz on July 6 and 7, which nearly led to the resumption of large-scale conflict between the United States and Iran.[29] Iran struck these vessels because some of them reportedly violated Iranian procedures for transit through the strait.[30] The United States responded to the attacks by striking at least 170 targets in Iran on July 7 and 9.[31] Five Iranian officials and two IRGC members familiar with the events said that Iranian President Masoud Pezeshkian called IRGC Commander Major General Ahmad Vahidi and demanded to know why Iranian forces attacked the three commercial vessels.[32] Vahidi reportedly told Pezeshkian that he “neither authorized nor had advance knowledge” of the attacks on vessels.[33] Vahidi, as commander of the IRGC, would presumably be at least aware of all major IRGC attacks, particularly those that risked intensifying the conflict with the United States. Vahidi also reportedly told Pezeshkian that the Supreme National Security Council (SNSC) was not informed.[34] The SNSC's reported lack of advance knowledge is less unusual than Vahidi's own lack of foreknowledge given that the Iranian military chain of command does not run through the SNSC.[35] Unspecified officials familiar with Pezeshkian's discussions said that Pezeshkian learned that Iranian field commanders were under standing orders to attack vessels that violated Iranian rules without further approval from up the chain of command.[36] The report subsequently characterized the actors responsible for the July attacks as a “fringe hardline faction.”[37]

These Iranian sources may be attempting to shift culpability for the July attacks and characterize Vahidi as a more moderate actor in order to preserve negotiations with the United States. This portrayal of Vahidi would mark a substantial departure from Vahidi's observed behavior since assuming command in March 2026.[38] Vahidi's faction has repeatedly constrained more pro-concessions officials and driven the regime's hardline negotiating and military posture.[39] Iranian negotiators previously blamed an “errant” faction of hardliners — which ISW-CTP assessed at the time referred to Vahidi and his allies — for trying to undermine negotiations through the July attacks.[40] An effort to absolve Vahidi of his responsibility in perpetrating the July attacks could reflect the efforts of certain factions within Iran that seek to maintain negotiations with the United States in order to acquire relief for Iran's deteriorating economy.[41]

It is also possible that Vahidi may have indeed been unaware of the July attacks before they occurred, which would suggest that Mojtaba Khamenei or another senior hardline actor, such as Basij Commander Hossein Taeb, bypassed his authority as IRGC commander. Three Iranian officials separately said that government and security inquiries traced the decision to conduct the July attacks to Taeb.[42] Taeb held no formal position at the time of the July attacks, although he served as an adviser to previous and current IRGC commanders and maintained close ties with Supreme Leader Mojtaba Khamenei.[43] Taeb was reportedly dissatisfied with the decision to end the war and sign the MOU and made this known to the supreme leader, according to Iranian officials.[44] A Switzerland-based Iran analyst separately stated on September 13 that Mojtaba Khamenei bypassed senior regime leaders and directly ordered the IRGC Navy to conduct the attack, citing an unspecified source in Iran.[45] ISW-CTP cannot verify the claim, but it is consistent with the three Iranian officials' accounts that Taeb, who is close to Mojtaba, was involved.

Iranian officials' accounts confirm that hardliners remain the principal decision-makers within

the regime. These actors have demonstrated their willingness to risk military conflict with the United States in order to achieve key Iranian objectives, such as retaining Iranian control over the strait. It remains unclear whether Vahidi was aware of the July attacks before they took place. The resulting conclusion from either possibility — whether Vahidi knew or he did not — is that those with the authority to make consequential decisions for Iran are hardliners who are willing to use force to achieve their objectives.[46] This implies that this group is not a “fringe hardline faction” but actors with an extremely consequential degree of authority within regime decision-making circles.[47] The *New York Times*, citing Iranian officials, reported on September 13 that Iranian leaders and generals have debated two options to break the US naval blockade: resume negotiations or intensify attacks on US targets, including naval vessels, to kill US troops and raise global oil prices.[48] The regime elected to intensify attacks on US naval vessels and bases in recent weeks, which is another indicator that hardliners continue to dominate Iranian decision-making.[49]

US and Partner Military Operations

Iran reportedly attempted to seize a US naval drone in the Strait of Hormuz. US forces responded by striking two Iranian vessels on September 14, according to a US official speaking to Axios.[50] The US official stated that CENTCOM conducted a drone strike on two Iranian vessels that attempted to seize a US naval drone.[51] The Hormozgan Province Governor claimed that the US struck two fishing boats on September 14.[52]

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

See topline section.

Iranian Domestic Affairs

Iranian security forces raided an anti-regime Baloch separatist fighters’ hideout in Saravan, Sistan and Baluchistan Province, in southeastern Iran on September 12.[53] IRGC Ground Forces confirmed that a prolonged exchange of fire killed three IRGC soldiers and five Baloch fighters during the raid in northern Saravan.[54] The Mobarizoun Popular Front (MPF) — a coalition of Baloch anti-regime groups — claimed that four MPF fighters and nine regime forces were killed in a nine-hour engagement, which is longer than a standard exchange of fire between these forces in this area.[55] Other anti-regime outlets claimed that the exchange of fire lasted between seven and nine hours and caused extensive damage to the area.[56] Iranian authorities routinely conduct counterinsurgency

operations against Baloch militant groups in Saravan.[57]

An unknown gunman killed a prominent Sunni cleric in Sistan and Baluchistan Province for the second time in three months.[58] The unknown gunman killed Zahedan Friday Prayer Leader Molavi Yousef Gargij outside his residence in Zahedan, Sistan and Baluchistan Province on September 12.[59] This assassination follows the recent assassination of a Sunni cleric and Friday Prayer Leader Molavi Mohammad Anvar Rigi by unknown actors in Mirjaveh, Sistan and Baluchistan Province in July.[60] Anti-regime media noted at the time that the Supreme Leader's representative in Sistan and Baluchistan Province had appointed Rigi to his position, which suggests that Rigi may have been close to the regime.[61]

Lebanon

Nothing significant to report.

Iraq

The Iraqi Prime Minister's senior financial advisor denied to Kurdish media on September 15 that the United States has threatened to suspend monthly dollar transfers to Iraq if Iraqi militias do not surrender their weapons by the September 30 disarmament deadline.[62] The same Kurdish outlet reported on September 14 that the United States issued the threat during Iraqi Prime Minister Ali al Zaydi's July 2026 visit to Washington, DC.[63] The United States cut off Iraq's access to its oil revenue, which sits in the US Federal Reserve, due to militia activity in April 2026 and only fully resumed the dollar shipments in July 2026.[64] About 90 percent of Iraq's state budget comes from its oil revenue.[65]

Arabian Peninsula

Saudi Arabia or Yemeni government-affiliated forces are attempting to prevent Houthi forces from consolidating their new positions along the Red Sea coast. Yemeni government-aligned forces released footage of at least 11 Saudi or Yemeni government-affiliated airstrikes on Houthi command centers, supply lines, positions, and equipment near Mokha and Dhubab, Taiz Governorate, on September 14 and 15.[66] A Marib-based anti-Houthi journalist reported on September 14 that Yemeni government-aligned airstrikes targeted Houthi positions in Hays, Hudaydah Governorate, as well as Mokha and Dhubab cities.[67] The Houthis separately claimed that Saudi airstrikes targeted Hajjah, Taiz, and Lahij governorates on September 14.[68] Yemeni government-aligned forces designated a fire coordination area near Mocha and Dhubab on September 10 to target Houthi positions.[69] These strikes likely intend to prevent Houthi forces from consolidating control over positions that the group has seized since September 9 and 10 on Yemen's Red Sea coastal plain.[70]

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Iran Update, September 16, 2026



William Doran, Nidal Morrison, Adham Fattah, Katherine Wells, Benjamin Schmida, Ria Reddy, 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 pursuing diplomatic efforts that are likely intended to prevent the United States or its partners from supporting or joining the Saudi offensive campaign against the Houthis by claiming that the group currently has no intention to target international shipping. Allowing the Houthis to consolidate their recent advances near the Bab al Mandeb Strait would enable the group to disrupt shipping at any time and for any reason in the future, even if the Houthis have no immediate plans to attack international shipping.
2. The Houthis announced on September 16 that Houthi forces conducted ballistic missile and drone attacks targeting military and oil infrastructure sites in western Saudi Arabia. The Houthis have attacked Saudi oil infrastructure since July 2026 to maximize the political and economic costs of the Saudi campaign to compel Saudi Arabia to surrender to Houthi demands, which include ending Saudi military activity and support for anti-Houthi forces in Yemen and lifting the Saudi blockade on Houthi-controlled territory.
3. The Shia Coordination Framework, which includes some Iranian-backed Shia parties, reportedly negotiated a three-phase disarmament agreement with some Iranian-backed Iraqi militias that would enable the militias to keep their weapons and fail to meet US expectations for militia disarmament. The reported agreement also appears to meet Iranian-backed Iraqi militias' demand for the expulsion of Turkish forces from Iraq as a condition for their disarmament.

Toplines

The Houthis are pursuing diplomatic efforts that are likely intended to prevent the United States or its partners from supporting or joining the Saudi offensive campaign against the Houthis by claiming that the group currently has no intention to target international

shipping. Allowing the Houthis to consolidate their recent advances near the Bab al Mandeb Strait would enable the group to disrupt shipping at any time and for any reason in the future, even if the Houthis have no immediate plans to attack international shipping. Several unspecified sources told *Reuters* on September 16 that US officials met with Houthi representatives, including the Houthis' primary spokesperson and diplomat Mohammad Abdulsalam, in Muscat, Oman, on September 13.[1] Two of the sources claimed that the Houthis told US officials that the group has no intention to target US vessels and that the Houthis are committed to the May 2025 US-Houthi ceasefire.[2] The US government has not confirmed the meeting at the time of this writing.[3] US President Donald Trump previously told reporters on September 12 that the Houthis had contacted the United States to clarify that the group does not seek a conflict with the United States.[4] Trump characterized the war in Yemen and Saudi Arabia as a limited and contained conflict.[5] These Houthi efforts come amid concurrent Saudi efforts to secure international support for and participation in military operations against the Houthis.[6]

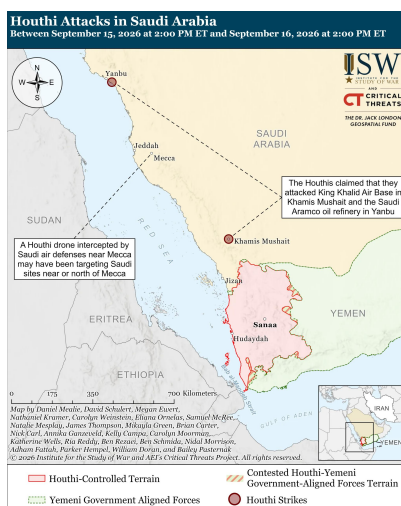
The Houthis are likely attempting to assure the United States that they will not attack US vessels in order to avoid provoking a renewed large-scale US air campaign, similar to Operation Rough Rider, that would target and degrade Houthi military capabilities and infrastructure.[7] The Houthis likely seek to contain the current conflict because a limited conflict provides them with the most favorable conditions to erode Saudi Arabia's willingness to continue fighting. The Houthis almost certainly calculate that a single adversary is easier to coerce than a multinational coalition with vast military capabilities.

The Houthis' diplomatic efforts come amid the group's efforts to try to consolidate their recent territorial gains in southwestern Yemen to establish long-term leverage over international shipping.[8] The Houthis captured the last key Yemeni government-controlled ports on the Red Sea coast, along with the rest of the Red Sea coastal plain, the Hanish Islands, and Perim Island, between September 9 and 11.[9] Houthi control over this terrain renders the group the sole de facto political authority on Yemen's Red Sea coast and sets conditions for the Houthis to assert authority over the Bab al Mandeb.[10] The Houthis could use a permanent force presence along the Red Sea coastal plain and on islands in the southern Red Sea to attack international vessels at a closer range in the future. Current Houthi promises to refrain from restricting international, non-Saudi maritime traffic through the Bab al Mandeb offer no guarantee that the group will perpetually refrain from attacking vessels belonging to the United States and its allies. The Houthis could also credibly threaten to attack such vessels at close range in order to extract demands from their adversaries.

The Houthis announced on September 16 that Houthi forces conducted ballistic missile and drone attacks targeting military and oil infrastructure sites in western Saudi Arabia. Houthi military spokesperson Yahya Sarea announced on September 16 that the Houthis launched ballistic missiles and drones targeting the Saudi Aramco oil refinery in Yanbu, which is about 900 kilometers northwest of the Saudi Arabia-Yemen border.[11] The Houthis have attacked Saudi oil infrastructure since July 2026 to maximize the political and economic costs of the Saudi campaign to compel Saudi Arabia to surrender to Houthi demands, which include ending Saudi military activity and support for anti-Houthi forces in Yemen, lifting the Saudi blockade on Houthi-controlled territory, securing Saudi support for Houthi civil servant salaries, and extracting Saudi war reparations for attacks on Houthi-controlled territory.[12] Sarea also claimed that the Houthis fired ballistic missiles targeting a Saudi air base in Khamis Mushait, which almost certainly refers to the King Khalid Air Base.[13] Attacks on King Khalid Air Base, which Saudi Arabia uses to conduct airstrikes on Houthi targets in Yemen, are intended to disrupt Saudi air campaign operations.[14] Disruptions to Saudi air capabilities are intended to relieve pressure on Houthi ground forces, which are currently engaged in heavy combat with Yemeni government-aligned forces across various fronts in northern, central, and southern Yemen.[15] The Saudi Civil Defense issued early warning alerts for various cities and areas in western Saudi Arabia, including Khamis Mushait and

Mecca, on September 15.[16] Saudi authorities did not issue an alert for Yanbu, however.

Saudi air defenses intercepted a Houthi drone in Saudi airspace near Mecca on September 15 that may have been targeting Saudi military or oil infrastructure sites near or north of Mecca.[17] The Saudi Coalition Joint Forces Command announced on September 16 that Saudi air defenses intercepted the drone before it entered Mecca's restricted airspace.[18] The Saudi government accused the Houthis of attempting to attack Mecca and deemed any attack on the city or its holy sites to constitute a "red line" because of its religious importance in Islam.[19] The Houthis denied the Saudi claim, and Iranian media characterized the incident as a Saudi "false flag" operation intended to turn popular and government opinions in the Islamic world against the Houthis.[20] It is unlikely that the Houthis deliberately attempted to attack Mecca because the city is of universal significance in Islam and possesses few Saudi military or economic targets that would meaningfully advance the Houthi strike campaign in Saudi Arabia. The Houthis also have an incentive to avoid targeting Mecca because a strike on the holy city would draw widespread Yemeni and worldwide condemnation and opposition to the Houthis.[21] A Houthi drone launched from western Yemen could have approached Mecca airspace while en route to a target further north, such as Yanbu. Mecca is also situated between the major Saudi cities of Jeddah and Taif, which possess industrial and military targets that the Houthis would have greater incentive to target. The Saudi Civil Defense issued simultaneous early warning alerts for Mecca, Jeddah, and Taif on September 15.[22]



The Shia Coordination Framework, which includes some Iranian-backed Shia parties, reportedly negotiated a three-phase disarmament agreement with some Iranian-backed Iraqi militias that would enable the militias to keep their weapons and fail to meet US expectations for militia disarmament.[23] Several sources and officials told Saudi-owned media on September 15 that the framework committee tasked with negotiating with the militias reached an agreement with some militia representatives.[24] It is unclear which militias support this agreement. Saudi-owned media, citing a draft of the agreement that it reviewed, reported that the agreement has three phases, the first of which would begin on September 30 and last until December 31.[25] Iranian-backed Iraqi militias would "pledge to integrate their fighters" into Popular Mobilization Forces (PMF) brigades during the first phase.[26] Many Iranian-backed Iraqi militias control PMF brigades.[27] ISW-CTP has previously assessed that integrating militia fighters into the PMF, which is an Iraqi state security service, without addressing the militias' networks and allegiance to Iran would likely further embed Iranian influence within the Iraqi state.[28] Saudi-owned media did not indicate that the agreement it reviewed includes any measures to address militia fighters' allegiance to Iran.[29] The agreement's text is not publicly available at this time.

The reported agreement also allows Iranian-backed Iraqi militias to maintain access to their

weapons on the condition that they do not use them.[30] This stipulation is consistent with one reported framework plan to “regulate militia weapons” that would allow the militias to retain control over their weapons under unspecified rules.[31] ISW-CTP assessed on September 11 that the ambiguity of the rules that would govern this “regulation” and how they would be enforced suggests that this framework proposal is intended to enable the militias to retain their weapons and use them at will.[32] Iranian-backed Iraqi militias Kataib Hezbollah, Harakat Hezbollah al Nujaba, and the Badr Organization supported this proposal, according to US-funded regional media on September 10.[33] Both of these militias have repeatedly refused to disarm. Their support for this proposal therefore further suggests that the proposal fails to adequately address the militias’ access to their weapons.[34]

The reported agreement between the framework and unspecified militias also stipulates that “any agreement on the non-use of weapons shall be deemed void under specific circumstances,” according to Saudi-owned media on September 15.[35] It is unclear what “specific circumstances” refers to, but two informed individuals told Saudi-owned media that unspecified militias only supported the agreement on the condition that any party can void the agreement if the “Iran War” resumes during any stage of its implementation or if any framework party or militia faces an “existential threat.”[36] The threshold for what the militias or framework parties would consider an “existential threat” is unclear. The ambiguity of these conditions suggests that they serve to preemptively justify the militias’ use of their weapons. Iranian-backed Iraqi militias and Iran could also decide at any time, and for any reason, that the agreement is null and void.

The reported agreement also appears to meet Iranian-backed Iraqi militias’ demand for the expulsion of Turkish forces from Iraq as a condition for their disarmament.[37] The agreement’s second phase, which would begin in early 2027, stipulates that unspecified actors would schedule the complete withdrawal of Turkish forces from Iraq by July 1, 2027.[38] The third phase proposes the creation of a committee comprised of the PMF, the framework, Iranian-backed Iraqi militias, and the Iraqi government to monitor the integration of militia fighters into the PMF and the implementation of the Turkish withdrawal until early 2028.[39] Some Iranian-backed Iraqi militias have recently conditioned their disarmament on Turkey’s withdrawal from northern Iraq.[40] Turkey has maintained several permanent military bases across northern Iraq since 2018 to combat the Kurdistan Workers’ Party (PKK), according to a BBC analysis in 2025.[41] Turkey, Iraq, and the Kurdistan Regional Government (KRG) agreed in September 2026 on a framework to disarm the PKK, which previously announced its intention in May 2025 to disband and disarm.[42] Iranian-backed Iraqi militias have repeatedly demanded the withdrawal of Turkish forces from Iraq since 2024 and view the Turkish presence as a violation of Iraqi sovereignty.[43] It is unclear whether Turkey intends to withdraw from Iraq if the PKK disarms, however. Linking the withdrawal of Turkish troops with Iranian-backed Iraqi militias’ compliance with this agreement could be designed to give the militias leeway to use their weapons if Iraqi militias assume that Turkey will not withdraw from Iraq.

Iraqi Prime Minister Ali al Zaydi also reportedly pursued separate bilateral negotiations with Harakat Hezbollah al Nujaba and Kataib Sayyid al Shuhada as part of his ongoing disarmament efforts.[44] Saudi-owned media, citing “reliable” sources, reported on September 15 that Zaydi engaged in separate, bilateral dialogues with Harakat Hezbollah al Nujaba and Kataib Sayyid al Shuhada, during which he reportedly offered them “civilian privileges,” which likely refers to government jobs, in exchange for disarmament.[45] Both militias were also engaged in the framework’s negotiations.[46] It is unclear why Zaydi decided to pursue separate negotiations with both militias, but Saudi-owned media reported that Zaydi reportedly told Shia party leaders that the framework committee negotiating with the militias is “biased.” The framework’s negotiating committee includes several Iranian-aligned actors, including State of Law head Nouri al Maliki and Iranian-backed Badr Organization Secretary General Hadi al Ameri.[47] Zaydi’s reported offer to both militias is consistent with previous

reports that Zaydi offered to allocate jobs in security institutions to militias that agree to disarm.[48] A source close to one of the militia's leaders told Saudi-owned media that the militias that engaged in the bilateral negotiations with Zaydi demanded legal guarantees against legal prosecution and a "waiver on background checks for their members and leaders." [49] The source added that these guarantees are impossible for the Iraqi government to meet but said that the militias demanded them to buy time, which underscores that neither militia was negotiating with Zaydi in good faith or intended to disarm.[50]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Nothing significant to report.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Multiple shops in northwestern Iran went on strike on the fourth anniversary of Mahsa Amini's death, which highlights how parts of the Iranian population maintain grievances against the regime. Anti-regime media reported on September 16 that multiple Iranian businesses across Kermanshah, Kurdistan, and West Azerbaijan provinces in western Iran closed in honor of the anniversary of Amini's death.[51] The regime's killing of Amini in September 2022 sparked a series of spontaneous demonstrations that evolved into a countrywide and months-long protest movement.[52] Anti-regime media reported that regime security forces were deployed across western Iran to pressure businesses to reopen and patrol the area.[53] These strikes come amid heightened regime concern about the potential for economic-related unrest and follow the largest protest wave in Iran's modern history in Winter 2025-2026.[54] The Winter 2025-2026 protests stemmed from public grievances against the regime's economic mismanagement but evolved into widespread anti-regime protests.[55]

Iran is engaging international trading partners that have historically supported Iranian sanctions evasion efforts, almost certainly as part of a broader Iranian effort to offset growing US economic pressure. Senior Iranian government officials have attended several BRICS, Shanghai Cooperation Organization, and Organization of Islamic Countries (OIC) events in recent weeks and repeatedly emphasized the importance of developing alternatives to the US dollar-based financial system.[56] Iranian Central Bank Governor Abdolnaser Hemmati met with his Turkish and Tunisian

counterparts to discuss strengthening bilateral and multilateral trade and banking cooperation on the sidelines of the OIC Central Bank Governors' meeting in Istanbul on September 14, for example.[57] Turkey has previously hosted US-sanctioned front companies that the Iranian regime has used to obfuscate its transactions.[58]

Iranian President Masoud Pezeshkian separately met with Abu Dhabi Crown Prince Khaled bin Mohamed bin Zayed al Nayhan on the sidelines of a BRICS summit in New Delhi on September 12.[59] The meeting comes after the United Arab Emirates (UAE) announced in August that it would halt all trade and financial transactions with Iran.[60] The UAE has historically been one of Iran's top trading partners as well as a critical hub for Iran's shadow banking and sanctions evasion networks through which Iran generates significant revenue.[61]

Iranian Foreign Affairs Minister Abbas Araghchi separately met with People's Republic of China (PRC) Foreign Affairs Minister Wang Yi in Beijing on September 16.[62] The PRC Foreign Ministry readout of the meeting highlighted that Wang called on "all parties to take effective measures to open the Strait of Hormuz as soon as possible" and that the PRC does "not want regional tensions to spill further over into Yemen and the Red Sea." [63] The Iranian regime media readout notably omitted these details.[64] Iran has been engaged in a months-long effort to threaten shipping in the Strait of Hormuz to raise global oil prices, which has impeded the PRC's ability to trade with Iran, among its other Middle Eastern trading partners.[65] The PRC accounts for about 90 percent of Iran's oil exports.[66] Recent Houthi efforts to consolidate control over the Bab al Mandeb and Yemen's Red Sea coastline also support the Iranian campaign to increase pressure on the global economy. Araghchi and Wang may have discussed the PRC's shipping concerns and potential solutions, including methods for Iran and the PRC to circumvent the US naval blockade.

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

The Houthis purportedly shot down a Saudi F-15 fighter jet for the first time over Marib Governorate on September 15.[67] Houthi footage published on September 15 shows an unidentified Houthi air defense system striking a Saudi F-15, after which the aircraft crashes in Marib Governorate.[68] The footage also shows Houthi fighters inspecting the crash site, including one of the F-15's vertical stabilizers, which displays the Saudi flag and tail number.[69] Multiple open-source intelligence (OSINT) accounts assessed that the Saudi F-15 likely belonged to the Royal Saudi Air Force 55th Squadron, which is based at King Khalid Air Base in Khamis Mushait.[70] The footage suggests that Houthi forces engaged the Saudi F-15 with radar-guided surface-to-air missiles (SAM) rather than infrared systems because the jet does not appear to deploy countermeasures in the footage.[71] The Houthis possess a variety of advanced radar-guided SAM systems that the group previously employed to shoot down US drones during "Operation Rough Rider" in 2025.[72] Iran previously shot down a US F-15E for the first time with a man-portable air defense system in April 2026, reportedly using tactics adapted from

the Russia-Ukraine war.[73] Saudi sources have not confirmed the incident at the time of this writing. There is also no conclusive evidence of whether the Houthis doctored the September 15 footage. If the Houthis doctored the footage, its release likely represents an informational effort to increase domestic support for the Houthis or to deter the United States from entering the conflict.

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Iran Update, September 17, 2026



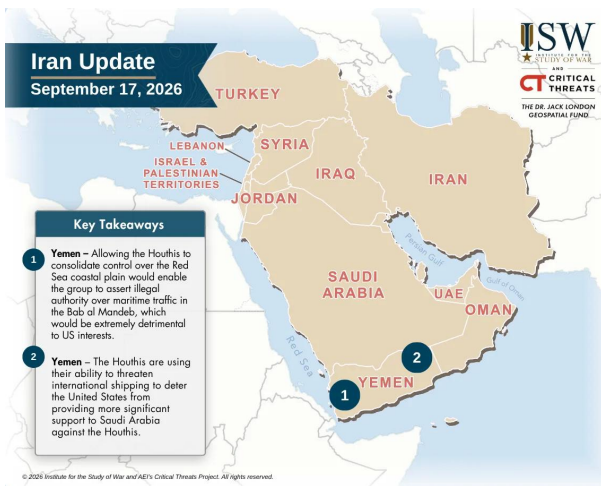
William Doran, Bailey Pasternak, Ben Rezaei, Carolyn Moorman, Annika Ganzeveld

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. Allowing the Houthis to consolidate control over the Red Sea coastal plain would enable the Houthis to assert illegal authority over international maritime traffic in the Bab al Mandeb Strait, which would be extremely detrimental to US interests. The Houthis' recent military activity in the Red Sea coastal plain indicates that the group is trying to reinforce its de facto control over the Red Sea coast in tandem with its efforts to assert illegal authority over maritime traffic.
2. The Houthis are using their ability to threaten international shipping to deter the United States from providing more significant support to Saudi Arabia against the Houthis. The Houthis have effectively told the United States that the group will not attack international, non-Saudi vessels if the United States refrains from supporting Saudi Arabia and confronting the Houthis. This diplomatic "understanding" is intended to deter the United States from becoming more involved in the conflict by warning that the Houthis could attack international vessels if the United States supports Saudi Arabia militarily.
3. The current Houthi military campaign against Saudi Arabia is malignant and imposes economic costs on the entire international community, not solely Saudi Arabia. Saudi Arabia is one of the world's largest oil producers, and attacks on its major oil refineries and other facilities contribute to high oil prices worldwide.
4. Saudi and international attempts to restrain the Houthis through mediation or contact with Iran are unlikely to succeed because the Houthis are an independent partner of Iran that pursues discrete objectives. The Houthis' campaigns in Yemen, Saudi Arabia, and the Red Sea simultaneously advance both Houthi and Iranian objectives, which makes it further unlikely that Iran would try to "rein in" the Houthis.



Toplines

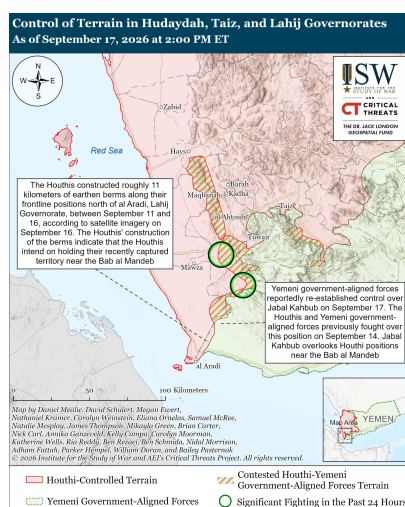
Allowing the Houthis to consolidate control over the Red Sea coastal plain would enable the Houthis to assert illegal authority over international maritime traffic in the Bab al Mandeb Strait, which would be extremely detrimental to US interests. International media has reported in recent days that the Houthis and the United States informally agreed to avoid conflict with one another following a September 13 meeting between Houthi and US representatives in Muscat, Oman.[1] A regional source familiar with the meeting told Axios on September 16 that the Houthis are “committed to allow” non-Saudi vessels to transit the Bab al Mandeb Strait during the meeting, provided that the United States upholds its ceasefire with the Houthis that began in May 2025.[2] The Houthis’ pledge to “allow” non-Saudi navigation through the strait indicates that the Houthis seek to assert authority over international shipping by determining which vessels are “allowed” to transit and which vessels the Houthis would prohibit from transiting through the strait.[3] The Houthis would likely use force against “violating” vessels, given that the Houthis have attacked several Saudi vessels in the Red Sea since July as part of the Houthi blockade on Saudi Arabia.[4] The Houthis have made similar statements in recent weeks emphasizing that the Red Sea and the Bab al Mandeb are open to non-Saudi vessels and that the Houthis will provide “free and optional” safe passage services to these vessels.[5] Current Houthi promises to refrain from restricting international, non-Saudi maritime traffic through the Bab al Mandeb provide no guarantee that the group will perpetually refrain from attacking vessels belonging to the United States, its allies, and other Houthi adversaries.

The Houthis’ recent military activity in the Red Sea coastal plain indicates that the group is trying to reinforce its de facto control over the Red Sea coast in tandem with its efforts to assert illegal authority over maritime traffic. The Houthis currently possess near-exclusive control over the Red Sea coastal plain in Yemen and major islands in the southern Red Sea following a major military offensive against the Yemeni government between September 9 and 11.[6] The Houthis will likely exploit their control over this advantageous terrain to try to claim illegal authority over the Bab al Mandeb.[7] Evidence of Houthi efforts to construct berms east of the Bab al Mandeb in recent days indicates that Saudi and Yemeni government efforts to deny the Houthis control of terrain along the strait have thus far been unsuccessful, and that the Houthis are preparing to defend and ensure their long-term control of this terrain.[8]

The Houthis are using their ability to threaten international shipping to deter the United States from providing more significant support to Saudi Arabia against the Houthis. The Houthis have effectively told the United States that the group will not attack international, non-Saudi

vessels if the United States refrains from supporting Saudi Arabia and confronting the Houthis.[9] This diplomatic “understanding” is intended to deter the United States from becoming more involved in the conflict by warning that the Houthis could attack international vessels if the United States supports Saudi Arabia militarily. The United States has reportedly declined Saudi requests for direct military support against the Houthis during the current conflict.[10] US and international unwillingness to challenge current Houthi political and military activities, including the group’s capture of the Red Sea coastal plain and Houthi statements that subtly assert illegal control over an international waterway, reinforces the Houthis’ deterrence against the United States and its partners.[11]

The current Houthi military campaign against Saudi Arabia is malignant and imposes economic costs on the entire international community, not solely Saudi Arabia. Saudi Arabia is one of the world’s largest oil producers, and attacks on its major oil refineries and other facilities contribute to high oil prices worldwide.[12] This economic effect impacts various global industries because petroleum is a necessary resource for producing combustible fuels, plastics, textiles, and other ubiquitous products.[13] These global economic costs also advance Houthi and Iranian objectives by imposing both direct pressure on Houthi and Iranian adversaries as well as indirect pressure through the international community.[14] Iranian decision-makers have sought to control traffic through the Strait of Hormuz throughout the current conflict in order to raise economic costs against the United States to degrade the United States’ willingness to continue the war.[15] The Houthis have similarly attacked Saudi tankers and oil infrastructure to maximize political and economic costs in Saudi Arabia, through which the group seeks to compel Saudi Arabia to submit to Houthi demands.[16] Houthi demands include ending Saudi military activity and support for anti-Houthi forces in Yemen, lifting the Saudi blockade on Houthi-controlled territory, securing Saudi support for Houthi civil servant salaries, and extracting Saudi war reparations for attacks on Houthi-controlled territory.[17]



The Houthis are attempting to fortify their positions along the Bab al Mandeb Strait amid reports that the Yemeni government re-established control over high ground that sits above Houthi positions near the Bab al Mandeb. Houthi efforts to reinforce their positions along the Bab al Mandeb indicate that the Houthis intend to hold and defend these positions. The Houthis constructed roughly 11 kilometers of earthen berms along their frontline positions north of al Aradi, Lahij Governorate, between September 11 and 16, according to satellite imagery on September 16.[18] Military forces can construct berms to hastily defend a position against direct fire and enemy advances.[19] CTP-ISW has not observed any Houthi attempts to construct structures that are typically used for a more protracted defense, such as trenches, near the Bab al Mandeb at the time of this writing.

Houthi efforts to reinforce positions by the Bab al Mandeb coincide with UK-based, Qatari-owned media

reporting that the Homeland Shield Forces and Southern Giants Brigades, which are military factions that are nominally part of the Yemeni government, re-established control over Jabal Kahbub on the Lahij-Taiz Governorate border on September 17.[20] Jabal Kahbub is a mountainous area that sits approximately 30 kilometers north of Houthi positions by the Bab al Mandeb, including the Houthis' berms. Yemeni government-aligned forces could utilize the advantageous high ground of Jabal Kahbub to engage Houthi forces along the relatively open Red Sea coastal plain. The Houthis and Yemeni government-aligned forces previously fought over the Jabal Kahbub area on September 13 and 14.[21]

Saudi and international attempts to restrain the Houthis through mediation or contact with Iran are unlikely to succeed because the Houthis are an independent partner of Iran that pursues discrete objectives. Iranian sources told Reuters on September 17 that the People's Republic of China (PRC), under Saudi urging, privately asked Iranian leaders to "rein in" the Houthis following the group's offensive on the Red Sea coastal plain.[22] PRC Foreign Affairs Minister Wang Yi met with Iranian Foreign Affairs Minister Abbas Araghchi in Beijing on September 16, although it is unclear whether the officials discussed the Saudi request.[23] These efforts incorrectly assume that the Houthis are beholden to Iranian decision-making and that the Houthis are a subordinate proxy, rather than a partner, to Iran. Characterizations of the Houthis as a proxy or solely an extension of Iran's Islamic Revolutionary Guards Corps (IRGC) distract the international community from applying meaningful pressure on the Houthis.[24] The Houthis receive extensive financial and military support from Iran but are not subject to Iranian command and pursue objectives that are independent of Iranian interests.[25] The Houthis did not support Iran following the start of the current conflict in February 2026 by striking US and Israeli targets or threatening shipping in the Red Sea, even though Iran reportedly encouraged the group to do so, for example.[26]

The Houthis' campaigns in Yemen, Saudi Arabia, and the Red Sea simultaneously advance both Houthi and Iranian objectives, which makes it further unlikely that Iran would try to "rein in" the Houthis. The Houthi campaign supports Iranian efforts to degrade the United States' will to fight by maximizing regional partners' economic and political costs, which Iranian leaders view as a means to influence US policymaking.[27] Iranian leaders specifically calculate that imposing economic pressure on US allies will compel those allies to pressure the United States to end the conflict.[28] The Houthis' attacks on Saudi oil infrastructure and ability to directly position military assets on the Bab al Mandeb also exacerbate global economic pressures stemming from the regional conflict.[29] IRGC-affiliated media published an op-ed on September 17 that argued that the Houthis' territorial gains on the Red Sea coastal plain, together with Iran's "powerful presence and management" over the Strait of Hormuz, increase economic pressure on the United States and its allies.[30] The op-ed argued that this economic pressure provides Iran with greater bargaining power in negotiations with the United States and expands Iran's long-term deterrence and leverage over international shipping and commerce.[31] Countries like the PRC have previously failed to "rein in" the Iranian regime's attempts to control the Strait of Hormuz and forcibly regulate international shipping because Iran has little incentive to forfeit this leverage.[32]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Nothing significant to report.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Iran is continuing to rebuild and harden its nuclear-related facilities as part of the regime's broader reconstitution efforts. The Institute for Science and International Security reported on September 17 that Iran is “rapidly” reconstructing the Taleghan 2 facility at the Parchin Military Complex in Tehran Province.[33] The Iranian regime previously used the Taleghan 2 facility to test explosives that are needed to detonate a nuclear device prior to the regime suspending its nuclear weapons program in 2003.[34] The United States and Israel struck the Parchin Military Complex multiple times and the Taleghan 2 site in particular at least once during the recent war.[35] Satellite imagery from September 13 showed construction activity, new concrete reinforcement for additional blast protection, and a tarp covering the destroyed facility to conceal reconstruction efforts from satellite and aerial observation.[36] The Institute separately reported on September 17 that Iran continues to strengthen passive defenses at the Natanz Nuclear Facility and the Mount Kolang Gaz La (Pickaxe Mountain) facility in Esfahan Province.[37] Satellite imagery from September 11 showed that Iran has maintained earthen roadblocks to obstruct access to Pickaxe Mountain's western tunnel portals and added soil over several tunnel entrances to harden them against aerial bombardment.[38] The Institute also assessed that Iran likely placed dirt mounds and road barriers at Natanz to complicate a ground raid.[39] The Institute added that Pickaxe Mountain does not currently appear operational but likely contains valuable equipment or materials.[40] An Israeli source told CNN in July 2026 that Iran had moved part of its highly enriched uranium (HEU) stockpile to the Pickaxe Mountain site.[41]

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

Saudi Arabia intercepted a Houthi drone over Taif on September 17.[42] The Houthis have not claimed the attack at the time of this writing. The Houthis previously launched ballistic missiles and drones at Taif on September 14.[43] It is unclear whether the Houthis intended to strike military facilities and energy infrastructure in Taif or other targets further north, such as in Yanbu. Continued Houthi drone attacks deep into Saudi Arabia are part of a recent geographical expansion of the Houthi strike campaign in Saudi Arabia to erode Saudi support for military operations in Yemen and compel Riyadh to accept Houthi demands.[44]

POWERED BY:  BABEL STREET

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Iran Update, September 18, 2026



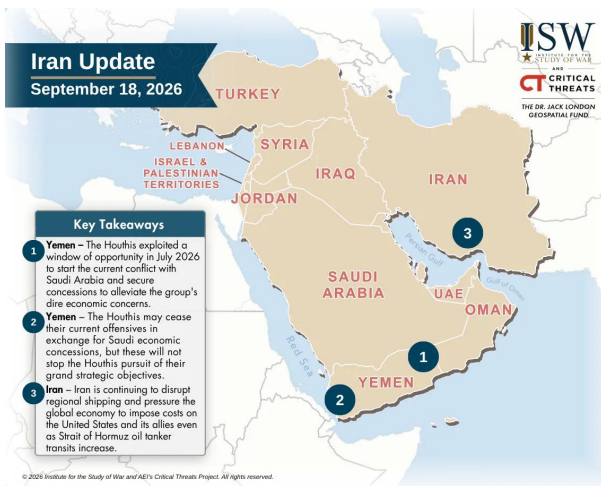
William Doran, Katherine Wells, Ben Rezaei, Parker Hempel, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing 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 exploited a window of opportunity in July 2026 to resume their war with Saudi Arabia and secure concessions from Saudi Arabia that would alleviate the group's dire economic situation. The Houthis, with Iranian backing and encouragement, sought to impose economic pressure on Saudi Arabia to accomplish their objectives because the group sees economic pressure as a useful lever that has previously forced Saudi capitulation to Houthi demands.
2. The Houthis may decide to cease their present offensives in exchange for Saudi economic concessions. Addressing these concerns will not, however, satiate or moderate the Houthis. The Houthis view solidifying control over northern Yemen as a prerequisite to controlling at least all of Yemen.
3. Pakistan may seek to exert leverage over Iran to restrain Houthi offensive activity against Saudi Arabia. The Houthis are an independent partner of Iran and may resist potential Iranian pressure to halt their campaigns, however.
4. The Houthis likely seek to capture Marib Governorate in order to extract and export oil through the Red Sea, which could fund Houthi political and military activities, assuming export is possible.
5. Iran has continued its efforts to disrupt regional shipping and pressure the global economy to impose costs on the United States and its allies, even as transits through the strait have increased relatively and oil prices remain low relative to Iranian hopes.



Toplines

The Houthis exploited a window of opportunity in July 2026 to resume their war with Saudi Arabia and secure concessions from Saudi Arabia that would alleviate the group's dire economic situation. The Houthis resumed the war when they imposed a “blockade” on Saudi Arabia on July 20 after Saudi attempts to prevent Iranian Islamic Revolutionary Guards Corps (IRGC) advisors from landing in Sanaa, Yemen's Houthi-controlled capital.[1] One Houthi strategic objective is to solidify and stabilize their rule over Houthi-controlled territory in northern and western Yemen, even while the Houthis seek to control all of Yemen at the grand strategic level. The Houthis have faced dire economic conditions in recent years as a result of their own actions — such as harassment of humanitarian organizations, which has resulted in a contraction of the humanitarian sector in northern Yemen — and external pressures.[2] The Houthis have sought to secure economic concessions from Saudi Arabia as part of an effort to solidify and stabilize their control in northern Yemen by addressing economic conditions.[3] Saudi Arabia has restricted vessels and aircraft from accessing Houthi-controlled ports and airports since 2015, which complicates Houthi attempts to obtain funding, military materiel, fuel, and daily goods.[4] The Houthis' most frequently expressed objectives in the current conflict are accordingly primarily economic in focus, such as forcing Saudi Arabia to pay war reparations, financing Houthi officials' salaries, and lifting controls on Houthi-held ports and airports.[5]

Addressing these concerns will not, however, satiate or moderate the Houthis. The Houthis view solidifying control over northern Yemen as a prerequisite to controlling at least all of Yemen (see below).

The Houthis, with Iranian backing and encouragement, sought to impose economic pressure on Saudi Arabia to accomplish their objectives because the group sees economic pressure as a useful lever that has previously forced Saudi capitulation to Houthi demands. The Houthis have long attacked Saudi infrastructure, and these attacks were ultimately one of the factors that compelled Saudi Arabia to reach a truce with the group in 2022.[6] The recent Houthi “blockade” on Saudi Arabia, which consisted of Houthi attacks on Saudi vessels in the Red Sea, largely failed to compel Saudi Arabia to surrender to Houthi demands, however.[7] This failure likely incentivized the Houthis to pursue alternative means of imposing costs on Saudi Arabia, most importantly by concentrating missile and drone strikes on Saudi oil infrastructure and conducting more significant military action within Yemen.[8]

The Houthis' outspoken pursuit of objectives related to economic relief and Saudi activity in Yemen has not diminished the group's focus on its grand strategic objective, which is to seize control over at least all of Yemen.[9] The Houthis institutionally subscribe to an ideology based on the Jaroudi school of Zaydi

Shia Islam, which the group believes grants them a divine right to rule over not just Yemen, but also territories controlled by Saudi Arabia and beyond.[10] Recent and ongoing Houthi offensive campaigns against the internationally recognized Yemeni government on the Red Sea coastal plain, in eastern Yemen's Marib Governorate, and surrounding the major city of Taiz support both the group's nearer-term economic objectives and long-term control over all of Yemen.[11] The Houthis' short-term economic objectives also set conditions for total Houthi control over Yemen, because some degree of economic stability is necessary for the Houthis to maintain control over Yemeni territory. The Houthis' additional demand for Saudi Arabia to end its military activity in Yemen further supports this grand strategic objective because the Yemeni government is unlikely to survive without Saudi military support.

The Houthis may decide to cease their present offensives in exchange for Saudi economic concessions, but concessions will not stop the Houthis' pursuit of their grand strategic objectives. Unspecified sources told Lebanese Hezbollah-aligned media on September 18 that Saudi Arabia offered the Houthis a two-week truce through Omani mediators, which the Houthis rejected.[12] The reported truce would have at least temporarily satisfied some Houthi demands, as it stipulated that Saudi would lift its controls on Houthi ports and airports for humanitarian purposes.[13] Humanitarian purposes could be insufficient for the Houthis, given their recent military successes. Saudi Arabia also reportedly sought to work toward a "comprehensive agreement" with the Houthis following the truce.[14] The truce could afford Saudi Arabia and Yemeni government-aligned forces both time and options to reconstitute ground forces and reorganize their campaigns against the Houthis, however.

The reported Houthi decision to reject the truce suggests that the group is either confident in its ability to extract additional concessions from Saudi Arabia or that it views its current tactical and operational situation to be difficult to defend, should major combat operations resume after a short-term ceasefire.[15] Saudi requests for a truce, if accurate, signal to the Houthis that their campaigns in Saudi Arabia and Yemen are eroding Saudi Arabia's will to fight and that their modes of warfare can compel Saudi Arabia to submit to Houthi demands. The Houthis have also presumably observed the lack of international support for Saudi Arabia against the group, which will influence Houthi risk calculus. The reported Saudi request for a two-week truce with the Houthis comes amid a lack of international support for the Saudi offensive campaign in Yemen, even though the United States has continued to provide intelligence and targeting support to Saudi Arabia.[16] It is unclear how long the Houthis are willing and able to sustain their offensive campaigns against Saudi Arabia and Yemeni government-aligned forces, however. A prolonged, high-intensity conflict with Saudi Arabia and the Yemeni government across numerous fronts in Yemen would inflict significant costs on the Houthis, especially if the group fails to secure economic concessions.

Pakistan may seek to exert leverage over Iran to restrain Houthi offensive activity against Saudi Arabia. The Houthis are an independent partner of Iran and may resist potential Iranian pressure to halt their campaigns, however. The *Financial Times* reported on September 18 that Pakistani Army Chief Asim Munir has been in frequent contact with Iranian officials, including Foreign Minister Abbas Araghchi, in recent days to ask Iran to force the Houthis to stop their attacks on Saudi territory and oil infrastructure.[17] Pakistan is party to a mutual defense treaty with Turkey and Saudi Arabia, often called the "Mecca Pact," which was ratified on August 7.[18] Munir reportedly referenced Pakistan's "commitments" to Saudi Arabia — almost certainly referring to Pakistan's Mecca Pact mutual defense obligations — in recent calls with Iranian officials.[19] Such insinuations in this context are implicitly threatening. Pakistani Defense Minister Khawaja Asif previously announced on September 17 that the "time has come" to implement the Mecca Pact in defense of Saudi Arabia.[20] Pakistani pressure on Iran does not guarantee that the Houthis end their offensive campaign against Saudi Arabia, however. The Houthis have repeatedly demonstrated since February 2026 that the group is primarily concerned with advancing its own objectives.[21] The Houthis are not an Iranian proxy, although their objectives

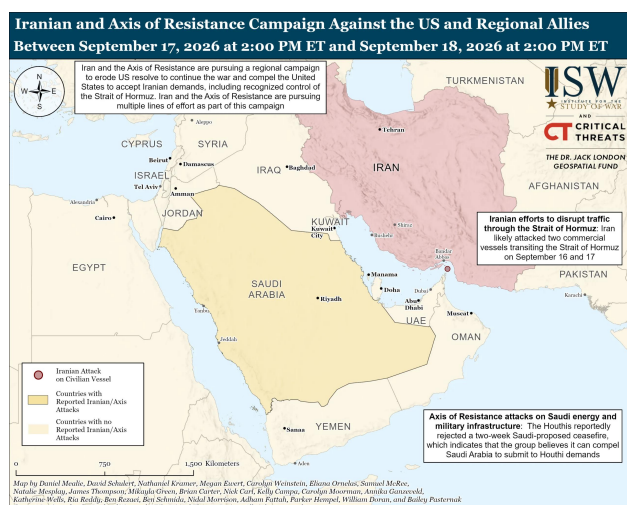
often overlap with Iran's strategic interests.[22] The Houthis did not support Iran following the start of the current conflict by threatening shipping in the Red Sea, even though Iran reportedly encouraged the group to do so, for example.[23]

The Houthis likely seek to capture Marib Governorate in order to extract and export oil through the Red Sea, which could fund Houthi political and military activities, assuming export is possible. Houthi and Yemeni government-aligned forces have engaged each other in northern, western, and southern Marib Governorate in recent days amid broader Houthi offensives across Yemen.[24] ISW-CTP does not assess that the Houthis have made considerable advances against Yemeni government-aligned forces in Marib Governorate. Western and regional media reported on September 17 and 18 that the Houthis are preparing reinforcements for offensives to capture the entire province.[25] Yemeni government-aligned forces defending against the Houthis in Marib Governorate benefit from more effective military leadership and more defensible terrain than forces facing the Houthis' Red Sea coastal plain offensive.[26] Marib Governorate possesses significant oil reserves, which the Houthis could extract to export from Hudaydah and other ports on the Houthi-controlled coastal plain.[27] Oil revenues, whether obtained through clandestine smuggling or formal contracts with foreign governments, would inject much-desired funding into Houthi-controlled territory and fund both Houthi governance and military activity.[28]

Iran continues to attack transiting vessels using the southern route to give the appearance that Iran retains some control over the strait and the ability to disrupt shipping. It likely assesses these actions can still impact energy markets. Daily vessel transits through the southern route have nonetheless subsequently returned to 40 percent of their pre-war levels, with both daytime and nighttime vessel

transits, with the help of successful US surveillance and demining operations, according to US officials speaking to Axios on September 15.[33] Saudi Arabia has also reportedly started diverting oil exports back through the strait. Saudi Arabia loaded around 60 million barrels at its eastern Port of Ras Tanura for September and October loadings with ship-to-ship transfers that transited through the strait, according to trade sources cited by Reuters on September 18.[34] Saudi Arabia's diversion is mostly in response to Houthi threats to Saudi exports and shipping in the Red Sea, but it indicates that Saudi Arabia assesses that exporting through the Strait of Hormuz is currently comparatively safer than shipping through the Bab al Mandeb Strait or Red Sea. Saudi Arabia's expansion of oil shipments through the Strait of Hormuz indicates that Iran is currently losing its ability to threaten shipping through the strait. Iran has failed to achieve its objective of maintaining oil prices over \$200 US dollars, which Iran threatened at the start of its campaign against shipping in the strait in March to impose costs on the United States for its airstrike campaign on Iran, as oil prices have also not risen over \$100 US dollars per barrel since May.[35]

Iran appears to be facing several operational constraints that are limiting its ability to control shipping through the strait, including constraints on its mine-laying capabilities and targeting cycles, following US airstrikes, however.[36] The deterioration of Iranian control over the strait, and its inability to affect the situation, indicates that Iran continues to face operational constraints despite its ability to fire a limited number of missiles, as ISW-CTP has previously assessed.[37] Individual attacks do not imply that Iran is facing no constraints; they only demonstrate that Iran can fire missiles *despite* the constraints.[38] These constraints are likely in part due to US airstrikes and in part due to US defensive actions taken to protect vessels transiting the strait. Iran would presumably attack the vessels transiting the strait if it could detect and shoot at them reliably. That Iran is failing to do so suggests it is constrained in some way.



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 expanding the scale of Basij mobilizations beyond the size of established Basij formations to build a broader population-based security and defense reserve that it can mobilize during unrest. The regime conducted a 313,000-person “Janfada” [self-sacrifice] exercise in Tehran Province on September 18, involving IRGC and Basij units and battalions.[39] The regime likely chose 313,000 for its religious symbolism, as 313 holds significance in Shia Islam as the number of followers expected to accompany Imam Mahdi upon his return.[40] The Basij is the IRGC’s nationwide paramilitary force and social network, which the regime has historically used for social control and to suppress domestic protests.[41] Basij Organization Commander Hossein Taeb said during the exercise that the regime is organizing hundreds of thousands of participants into defense units and training them for ground, air, and naval defense.[42] Taeb added that the regime plans to expand the reserve model nationwide to one million people and called the effort the “popularization of defense and security.”[43] Taeb’s description suggests that the regime is trying to convert a wider segment of the Iranian population that is currently not part of the formal regime security services or Basij into an organized reserve. This effort follows Supreme Leader Mojtaba Khamenei’s August 10 appointment of Taeb as Basij commander, when Mojtaba directed him to expand people-based security and intelligence networks, increase training, and strengthen neighborhood and social Basij structures.[44]

The regime likely has two related domestic objectives in expanding this kind of mass mobilization. The regime likely seeks to deter potential unrest by demonstrating that it can mobilize a large pro-regime presence on the streets and reinforce formal security forces during protests. The regime also likely seeks to strengthen cohesion among its own supporters by repeatedly organizing and training them and tying them more closely to the Basij and state security apparatus. The latter objective may become increasingly important as economic pressure affects the broader population, including Basij personnel and other regime-aligned constituencies. Iranian officials have recently warned that worsening livelihoods, unemployment, gasoline prices, and other economic pressures could trigger localized or nationwide unrest.[45]

The regime is also increasingly incorporating younger Iranians, including children, into this broader mobilization.[46] The regime has focused on re-ideologizing younger Iranians since former Supreme Leader Ali Khamenei launched the “Second Step of the Revolution” plan in 2019.[47] Recent public weapons training may push this effort beyond ideological indoctrination toward practical militarization. The regime has expanded military familiarization into more public settings by showing weapons training on state television and setting up public stations where pro-regime groups teach civilians how to handle rifles and other military equipment.[48]

The Supreme Leader’s Office recently appointed Ehsan Khandouzi, a pro-China and risk-averse economist who served as former President Ebrahim Raisi’s Economy Minister, to lead the Office’s strategic economic advisory committee.[49] The Office appointed Khandouzi to the

Office's Research Department Economic Committee on September 15.[50] This committee is responsible for providing the Supreme Leader with strategic assessments on the trajectory of Iran's economy.[51] Khandouzi, in an X post in June 2025, also emphasized the need for Iran to cooperate with the People's Republic of China (PRC) as Iran needs to secure funding for joint ventures, likely referring to the PRC-supported construction projects in Iran.[52] Khandouzi is also risk-averse when it comes to evaluating the economic and stability risks of different economic policies. Khandouzi cautioned in August 2026 against raising gas prices following December 2025-January 2026 protests and war with the United States, for example.[53] Khandouzi also warned about the Iranian Central Bank's unregulated foreign currency production leading to high inflation in June 2023 during his tenure as Economy Minister.[54] Khandouzi's appointment is notable considering the Central Bank's decision to inject \$500 million US dollars into Iran's banking system. The Bank's decision comes amid Iran facing a significant foreign currency shortage in part due to the US blockade's prevention of Iranian oil exports — the regime's highest source of revenue.[55] Iran's inflation rate notably reached 84.4 percent in August.[56]

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

Italian Defense Minister Guido Crosetto announced on September 17 that Italy is preparing to deploy warships to ensure safe passage for Italian commercial vessels through the Bab al Mandeb Strait.[57] Crosetto said that Italy will deploy a naval mission independently of the European Union to protect Italian vessels, according to Western and regional media on September 17.[58] Saudi media reported on September 18 that South Korea is considering expanding its naval presence in the Gulf of Aden to protect South Korean vessels and oil shipping routes.[59] The South Korean presence has been traditionally oriented against piracy.[60] These decisions suggest that some countries are attempting to safeguard their vessels amid the Houthis' recent attempts to assert authority over the Bab al Mandeb, following the Houthi offensive on the Red Sea coastal plain between September 9 and 11.[61]

POWERED BY:  BABEL STREET

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