

Iran Update, September 21, 2026



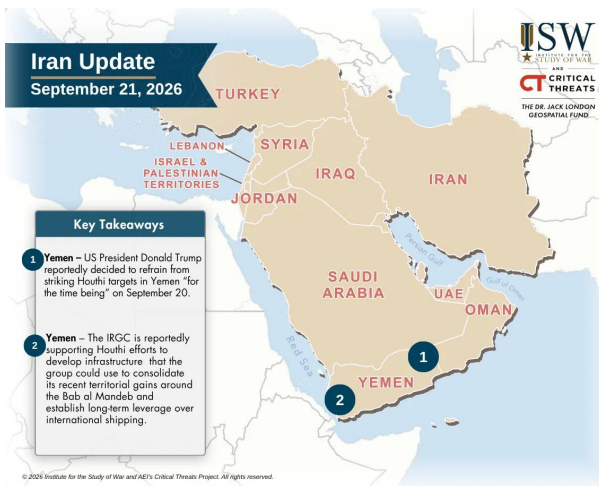
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Analyst Notes: Data Cutoff: 2:00 PM ET

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. US President Donald Trump reportedly decided to refrain from striking Houthi targets in Yemen “for the time being” on September 20.
2. The Islamic Revolutionary Guards Corps (IRGC) is reportedly supporting Houthi efforts to develop infrastructure in the Houthis’ newly captured territory along Yemen’s southwestern coast that the group could use to consolidate its recent territorial gains around the Bab al Mandeb and establish long-term leverage over international shipping. Two Houthi military sources told AFP on September 19 that IRGC personnel visited recently captured Houthi territory along Yemen’s Red Sea coastline and supervised Houthi efforts to construct tunnels along the mountainous terrain surrounding the port city of Mokha in Taiz Governorate.
3. Iranian Supreme National Security Council Secretary Major General Mohsen Rezaei used his September 20 interview with Qatari outlet Al Jazeera to further Iran’s ongoing effort to sow divisions between the United States and its Gulf allies. Rezaei also sought to portray Iran as a cooperative regional security partner to Gulf states, likely as part of an Iranian effort to secure recognized control of the Strait of Hormuz among other Persian Gulf littoral states.
4. Rezaei also claimed that Iran tested a new anti-ship missile armed with a cluster munition warhead in a recent Iranian attack targeting the USS George Washington aircraft carrier on September 5. The missile did not impact the warship but struck “near” the vessel, according to Rezaei.
5. Russia planned to deepen Russian economic support for Iran and deepen sanctions evasion collaboration between 2024 and 2026, according to the 44-page plan Fox News obtained and published on September 20.



Toplines

US President Donald Trump reportedly decided to refrain from striking Houthi targets in Yemen “for the time being” on September 20.[1] Unspecified US officials told the *New York Times* that Trump told US military officials on September 17 to prepare for US airstrikes against the Houthis after Saudi Crown Prince Mohammed bin Salman (MBS) appealed for US involvement in the Saudi-led air campaign.[2] MBS has reportedly made several such entreaties since the Houthis seized territory along Yemen’s southwestern coast on September 9 and 10.[3] The US State Department issued a security alert for the Middle East on September 19, citing the “potential for unforeseen escalation.”[4] Trump later decided to postpone the strikes, according to the US officials.[5] The president of Yemen’s internationally recognized government, Rashad al Alimi, also requested US military aid to fight the Houthis during a phone call with Trump on September 20, according to Reuters.[6] Trump did not pledge support to the Yemeni government during the phone call, according to two sources.[7] The United States recently increased intelligence and targeting support to Saudi Arabia amid ongoing Houthi attacks on the kingdom.[8]

The Islamic Revolutionary Guards Corps (IRGC) is reportedly supporting Houthi efforts to develop infrastructure in the Houthis’ newly captured territory along Yemen’s southwestern coast that the group could use to consolidate its recent territorial gains around the Bab al Mandeb and establish long-term leverage over international shipping. Two Houthi military sources told AFP on September 19 that IRGC personnel visited recently captured Houthi territory along Yemen’s Red Sea coastline and supervised Houthi efforts to construct tunnels along the mountainous terrain surrounding the port city of Mokha in Taiz Governorate.[9] These tunnel systems would likely support Houthi efforts to consolidate their positions on Yemen’s western coastal plain and defend against future Yemeni government counteroffensives that aim to recapture Mokha. These tunnels would also likely protect Houthi forces against ongoing Saudi airstrikes and thereby further complicate Saudi and Yemeni government efforts to dislodge the Houthis from positions along the coast.[10] Iranian support for the Houthis in this regard is part of an effort to advance Iranian objectives by increasing global oil prices and therefore increasing pressure on the United States to surrender to Iranian demands.

The two Houthi military sources also said that the Houthis and IRGC personnel discussed the installation of radar infrastructure near Mokha and on Zuqar Island, which is located north of the Bab al Mandeb Strait.[11] It is unclear which radar systems the Houthis and IRGC discussed installing, but discussions about installing radar systems near Mokha and on Zuqar Island suggest that such radars might contribute to the Houthis’ maritime sensing capabilities and support ongoing Houthi efforts to establish long-term

leverage over international shipping. A Houthi official told Lebanese Hezbollah-affiliated media on September 19 that the Houthi “coast guard” is mobilizing vessels to conduct “extensive maritime surveillance” within Houthi-“controlled” sections of the strait in response to potential attacks on vessels by pirates or “hostile parties.”[12] Radar systems could also, in theory, support Houthi air defenses that the group may seek to position in the area. The United States previously destroyed multiple Houthi air defense radar systems during strikes across Houthi-controlled Yemeni territory in 2024 and during Operation Rough Rider in 2025.[13]

Houthi-IRGC efforts to improve Houthi positioning and capabilities in southwestern Yemen come amid recent Houthi rhetoric that indicates that the group intends to exert control over shipping in the strait. Houthi Defense Minister Mohammad Nasser al Atifi stated on September 20 that the Houthi Navy has “imposed a secure framework” to ensure the “protection and security” of navigation in the Red Sea.[14] Atifi noted that this excludes Saudi vessels, given that the Houthis are currently enforcing a blockade against Saudi ports and vessels.[15] Houthi Political Bureau member Mohamed al Bukhaiti told Western media on September 20 that the Houthis confirmed to the United States that the group will not target any nation in the strait except for Saudi Arabia.[16] 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. Allowing the Houthis to determine which vessels may transit through the strait violates international maritime law and is unacceptable for US national security interests.[17]

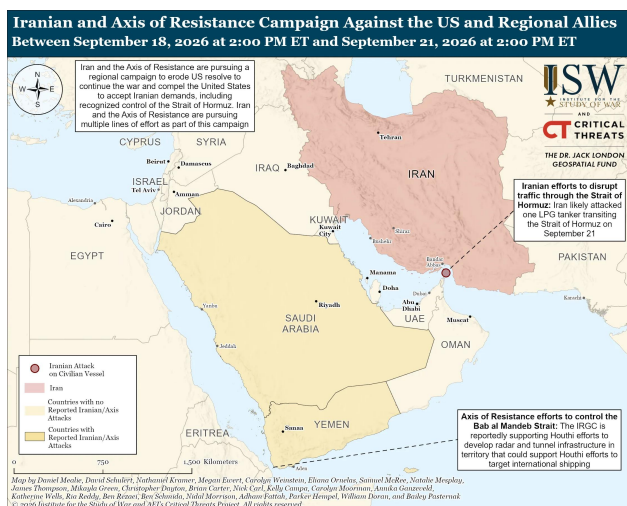
Iranian Supreme National Security Council Secretary Major General Mohsen Rezaei used his September 20 interview with Qatari outlet Al Jazeera to further Iran’s ongoing effort to sow divisions between the United States and its Gulf allies.[18] Rezaei urged Gulf states to reconsider their partnerships with the United States during the interview and repeated the Iranian regime’s longstanding narrative that the US military presence in the region is the primary source of regional insecurity.[19] This line of messaging supports Iran’s broader objective of reducing US military and political influence in the region.[20] Such narratives from Iranian officials ignore Iran’s own destabilizing activities against Gulf states, such as Iran’s support for Houthi attacks on Saudi military and energy infrastructure and continued threats to commercial shipping in the Strait of Hormuz and the Bab al Mandeb Strait.[21]

Rezaei also sought to portray Iran as a cooperative regional security partner to Gulf states, likely as part of an Iranian effort to secure recognized control of the Strait of Hormuz among other Persian Gulf littoral states.[22] Rezaei stated that Iran is willing to work with littoral states on an agreement to manage the strait.[23] Iranian leadership recognizes that consolidating Iranian control over the strait in the long term requires other littoral states to recognize Iran’s authority and management in the strait. Such cooperation is also required by the June 2026 US-Iran memorandum of understanding.[24] Iran has yet to reach an agreement that meets its own requirements for Iranian management over the strait and also satisfies the other Gulf states. Rezaei noted that Iraq and five other states refused to meet with Iran and Oman in Oman last week. These states met instead with US Central Command, Israel, and other Arab countries in Germany.[25] Several states, including Saudi Arabia and Oman, have protested against certain aspects of the most recent Iranian proposal, which reportedly included mandatory tolls.[26]

Iranian information operations aimed at sowing discord between the United States and its Gulf allies take place as Iran faces apparent challenges in enforcing its control over the Strait of Hormuz.[27] Iran still presents a serious threat to commercial vessels in the strait, as demonstrated by an Iranian attack on a vessel on September 21.[28] Gulf states have increasingly relied upon US-supported maritime arrangements and alternative transit routes that reduce Iran’s ability to disrupt or control shipping in recent weeks, however.^[29] Rezaei’s attempts to influence Gulf states away from their partnership with the

United States likely carry particular importance for the regime under such conditions.[30]

Rezaei also claimed that Iran tested a new anti-ship missile armed with a cluster munition warhead in a recent Iranian attack targeting the USS George Washington aircraft carrier on September 5.[31] The missile did not impact the warship but struck “near” the vessel, according to Rezaei.[32] Iranian media claimed that Iran fired Qassem Basir ballistic missiles in the attack.[33] The Qassem Basir, which Iran unveiled in May 2025, is a solid-fueled medium-range ballistic missile with a 1,200-kilometer range and a maneuverable reentry vehicle (MaRV) that allows missiles to maneuver mid-flight to evade air defenses.[34] The Qassem Basir is reportedly equipped with electro-optical seeker technology capable of tracking moving targets, according to the *Telegraph*. [35] Rezaei’s claim that Iran used a cluster munition comes after Iran’s recent firing of cluster munition warheads in an attack on US forces at Muwaffaq Salti Airbase in Jordan on September 8.[36] Cluster munitions disperse over a wide area and are intended to maximize damage. Iran regularly fired cluster munitions targeting Israeli civilian areas in March and April 2026, likely intended to maximize damage inflicted by Iranian ballistic missiles given their relatively low accuracy when fitted with standard warheads.[37] Iran’s deployments of cluster warheads targeting US forces and bases indicate that Iran seeks to inflict greater damage or casualties to impose further human and political costs on the United States.[38]



Russia planned to deepen Russian economic support for Iran and deepen sanctions evasion collaboration between 2024 and 2026, according to the 44-page plan Fox News obtained and published on September 20.[39] Russia approved the plan in September 2024, according to the document. The plan outlined a broad effort to deepen Russo-Iranian ties through nuclear and energy cooperation, Iranian production of Russian aircraft components, and the construction of new transport corridors.[40] The plan also called for both countries to expand the share of bilateral trade conducted in national currencies, expand correspondent banking, develop cross-border payments using central bank digital currencies, and connect banks through independent financial messaging systems.[41] Iran and Russia first operationalized the *Shetab-Mir* interbank payment system to circumvent the SWIFT payment system and the US dollar in 2024.[42]

The plans for Iranian and Russian cooperation between 2024 and 2026 are broadly consistent with the principles of Iran and Russia’s formal strategic partnership.[43] Such a partnership is of particular value to Iran as it engages in an active war with the United States. Russia has reportedly provided Iran with satellite imagery and military equipment, including man-portable air-defense systems (MANPADS) and drone components before and during the US-Israel-Iran war.[44] Iran’s relationship with Russia is also central to Iran’s broader campaign to circumvent sanctions through its regional partnerships and mitigate the effects of growing US economic pressure on Iran. Iran has recently met with other traditional trading

partners and facilitators of Iran's illicit networks as well as multilateral organizations as part of its campaign.[45]

The documents also emphasize Russo-Iranian collaboration in the media and communications sphere.[46] Both Russia and Iran use media and information campaigns to shape public perceptions and challenge Western influence, and Russia has significantly expanded its global soft power and media reach in recent years.[47] Iran may view Russia's experience as a useful model as Iran continues what it describes as a "hybrid war" with the United States, which includes efforts to compete in the informational and cognitive space.[48]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

See topline section.

US-Iran Negotiations

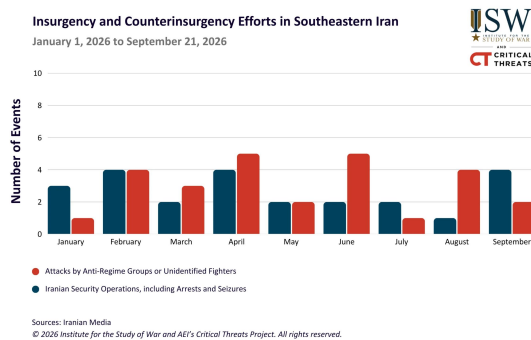
Nothing significant to report.

Iranian Domestic Affairs

Iranian regime security forces conducted several operations targeting anti-regime separatist groups in northwestern Iran. The Iranian Intelligence Ministry claimed that its forces killed one alleged separatist fighter in Piranshahr, West Azerbaijan Province, on September 20.[49] The ministry claimed that the fighter had planned to assassinate a local regime security commander.[50] The ministry also claimed that its forces arrested an operative who allegedly gathered and transmitted the coordinates of IRGC and Basij military bases to Israeli intelligence agents.[51] The regime has longstanding concerns about Kurdish separatism and militancy in Iran's western and northwestern provinces.[52] Iranian leaders have historically accused anti-regime Kurdish militias based in Iraq of operating and inciting social unrest in Iran's border provinces.

The regime is also facing internal security challenges in southeastern Iran. The Intelligence Ministry claimed that its forces arrested anti-regime operatives planning to bomb critical infrastructure in Bam, Kerman Province, on September 20.[53] IRGC-affiliated media separately reported on September 21 that anti-regime fighters killed an Iranian Law Enforcement Command officer in Iranshahr, Sistan and Baluchistan Province.[54] Sistan and Baluchistan Province is a hotspot for anti-regime activity, including

by anti-regime Baloch separatist groups that frequently attack Iranian security forces in southeastern Iran.[55] ISW-CTP has observed a slight uptick in regime security operations in southeastern Iran over the past month.



Lebanon

Nothing significant to report.

Iraq

Iraqi Prime Minister Ali al Zaydi is reportedly attempting to restrict Iranian military advisors' movement and activities in Iraq.[56] A senior Iranian-backed Iraqi militia official told US-funded, Arabic-language media on September 19 that Zaydi is aiming to introduce new rules that would require any foreign official or advisor, including from Iran, to use official channels to request a visit to Iraq and obtain an entry visa.[57] The rules would reportedly go into effect on September 30, which is the deadline for the Iraqi federal government to disarm the Iraqi militias and when US-led coalition forces will withdraw from Iraq.[58] Iranian advisors operate alongside the militias in Iraq, including those within the Iranian-backed Popular Mobilization Forces (PMF).[59] Zaydi's reported efforts to reduce Iranian military advisors' freedom of movement follow an Iraqi federal government memorandum in early September that appeared designed to restrict the movement and activities of senior Iranian security and military officials in Iraq.[60] That memorandum also explicitly restricted Iranian officials with security or military backgrounds from visiting Iraq, according to Lebanese media.[61] The new procedures that Zaydi is reportedly introducing may be an attempt to address the lack of specificity within the previous memorandum. This effort may also be in response to possible problems with Iraqi federal government enforcement or Iranian compliance. Iraqi sources speaking to Lebanese media on September 6 said that IRGC Quds Force Commander Brigadier General Esmail Ghaani's visit to Iraq in early July to attend former Iranian Supreme Leader Ali Khamenei's funeral procession violated an earlier version of the memorandum.[62]

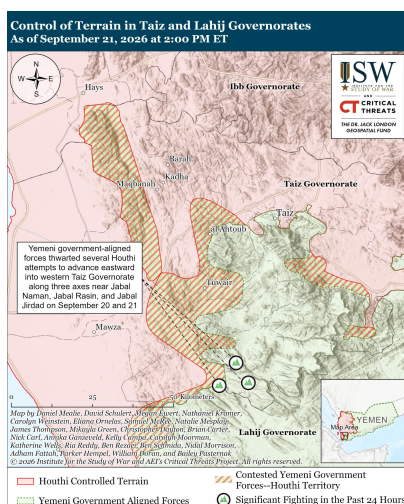
Zaydi's efforts to restrict the movement of Iranian officials in Iraq come amid his own attempts to consolidate his power as prime minister and the Iraqi government's continued work to restrict weapons to the state. Zaydi has reestablished the Office of the Commander-in-Chief of the Armed Forces, which places several security institutions under his authority, and considered major reform of the PMF, for example.[63] Zaydi reasserting Iraqi sovereignty in the form of restricting the activities of Iranian officials in Iraq would also support his position as prime minister. Iranian officials visiting Iraq in recent months have instructed the Iraqi militias to refrain from surrendering their weapons to the Iraqi government, which directly undermines Zaydi's effort to disarm the militias.[64] Zaydi's

efforts to curb unchecked Iranian activities in Iraq, while seemingly related to his own efforts to consolidate his power, also support the US objective of lessening Iranian influence in Iraq.

The Shia Coordination Framework committee tasked with negotiating with Iranian-backed Iraqi militias reportedly proposed a “Sovereignty Law” to unspecified framework parties that would address several relevant issues.[65] A framework source told Iraqi media on September 20 that the proposed law would “regulate” the Iraqi federal government’s process for receiving weapons from Iranian-backed Iraqi militias after the militias agree to surrender their weapons.[66] This proposed law would also instruct the PMF to create a “special drone unit” and arrange for local authorities above the “36th parallel,” which likely refers to the Kurdistan Regional Government, to monitor the withdrawal of Turkish forces from the area.[67] The 36th parallel marks the boundary of the no-fly zone the United States established in Iraqi Kurdistan in 1991 after the Gulf War.[68] The source also confirmed that unspecified framework parties discussed this proposed law during recent framework meetings, but it is unclear which framework parties support its passage.[69] The full text of the proposed law is not available at this time, but its clause regarding the withdrawal of Turkish forces is consistent with some aspects of a reported agreement that the framework reportedly negotiated in recent weeks with some Iranian-backed Iraqi militias that would enable the militias to keep their weapons.[70] That agreement reportedly stipulated that unspecified actors would schedule the complete withdrawal of Turkish forces from Iraq by July 2027 and proposed the creation of a committee to monitor the Turkish withdrawal.[71]

Arabian Peninsula

Yemeni government-aligned forces have reportedly repelled Houthi attempts to advance eastward into Taiz Governorate near Yemeni government-aligned supply lines that connect Taiz City and Aden City. The Houthis attempted to advance eastward into western Taiz Governorate along three axes near Jabal Naman, Jabal Rasin, and Jabal Jirdad on September 20 and September 21, according to a US-based Yemen analyst and Saudi media.[72] Yemeni government-aligned forces, including the Yemeni National Army, reportedly repelled Houthi forces’ attempts to advance.[73] These attempted Houthi advances follow a September 14 Houthi advance eastward from al Waziyah into al Shamayatan District, Taiz Governorate, west of the current Houthi advance attempts.[74] Further Houthi advances northeastward, particularly those near Jabal Jirdad, could threaten Yemeni government-aligned supply lines in al Turbah, Taiz Governorate, which connect Taiz and Aden cities. A US-based Yemen analyst assessed on September 20 that Houthi attempts to advance along these axes represent a Houthi effort to capture al Turbah.[75]



Endnotes

- [1] <https://www.nytimes.com/2026/09/20/us/politics/trump-yemen-houthis-red-sea-iran.html>
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Iran Update, September 22, 2026



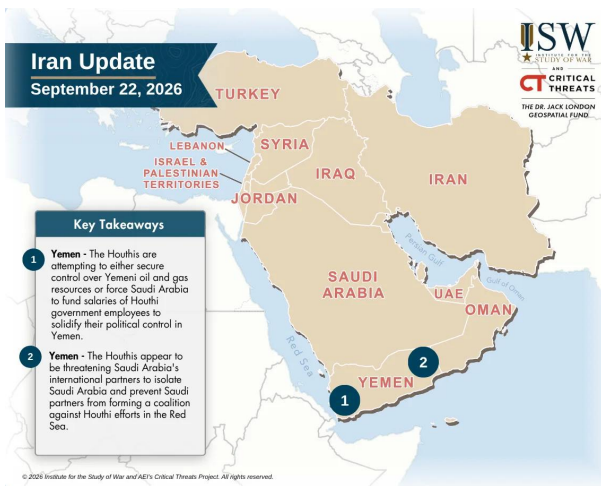
William Doran, Nidal Morrison, Adham Fattah, Bailey Pasternak, Katherine Wells, Brian Carter

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 are attempting to either secure control of Yemeni oil and gas resources or force Saudi Arabia to fund salaries of Houthi government employees, either of which would solidify their political control in Yemen and weaken the Yemeni government.
2. Houthi Supreme Leader Abdulmalik al Houthi demanded that Saudi Arabia stop "depriving" Yemen of the country's oil, gas, and other natural resource wealth during a speech on September 21. This demand indicates that the Houthis aim to control Yemen's oil and gas reserves because Abdulmalik views the Houthi authorities as "Yemen," not the internationally-recognized government.
3. The Houthis reportedly rejected earlier Saudi-proposed truce offers that would have resumed Houthi-Yemeni government negotiations on oil production and exports and civil servant salaries but did not appear to explicitly guarantee Houthi access to fuel revenues and salary funding.
4. The Houthis appear to be threatening Saudi Arabia's international partners to isolate Saudi Arabia and prevent Saudi partners from forming a coalition against Houthi efforts in the Red Sea.
5. The Houthis damaged an Italian Eurofighter Typhoon fighter jet during an attack targeting King Fahd Air Base in Taif, Saudi Arabia, on September 17. Italy deployed fighter jets to support defensive operations against Iranian strikes on Saudi Arabia. It is unclear whether the Houthis intentionally targeted the aircraft, but the Houthis questioned why the aircraft was there.
6. The Houthis may perceive this air defense mission as a potential hindrance to the group's offensive campaign against Saudi Arabia, which consists chiefly of attacks on Saudi oil facilities, amid various countries' defensive support for Saudi Arabia.
7. A Houthi attack that damages European aircraft deployed to Saudi Arabia to support Saudi efforts to defend against Iranian attacks also supports Iranian objectives to break the coalition defending Gulf states against Iran.



Toplines

The Houthis are attempting to either secure control of Yemeni oil and gas resources or force Saudi Arabia to fund salaries of Houthi government employees, either of which would solidify their political control in Yemen and weaken the Yemeni government. Houthi Supreme Leader Abdulmalik al Houthi demanded that Saudi Arabia stop “depriving” Yemen of the country’s oil, gas, and other natural resource wealth during a speech on September 21.[1] This demand indicates that the Houthis aim to control Yemen’s oil and gas reserves because Abdulmalik views the Houthi authorities as “Yemen,” not the internationally-recognized government.[2] The dire economic situation in Houthi-controlled areas could threaten Houthi long-term control, so securing greater revenue through military or diplomatic action would satisfy their strategic objectives of solidifying control.[3] Control of the oil and gas fields would also place the Houthis in control of most of Yemen’s economically viable areas and resources, thus permanently solidifying their political control of Yemen.

The Houthis reportedly rejected earlier Saudi-proposed truce offers that would have resumed Houthi-Yemeni government negotiations on oil production and exports and civil servant salaries.[4] The Houthis have consistently demanded that Saudi Arabia fund civil servant salaries in Sanaa as part of a 2023 Houthi-Saudi agreement.[5] Saudi Arabia’s latest truce offer does not appear to explicitly guarantee Houthi access to fuel revenues and salary funding, however. The truce would have forced the Houthis to stop military action, while the Houthis believe they have the upper hand, without guaranteeing that the Houthis would accomplish their objectives. The Houthis’ rejection of this alleged Saudi proposal may indicate that they are unwilling to accept truce offers that do not improve their economic position through either control of Yemeni oil and gas or increased revenues from salary payments.[6]

The Houthis likely intend to secure control of Yemeni oil and gas to alleviate dire economic conditions in Houthi-controlled territory and advance the group’s objective of controlling all of Yemen.[7] The Houthis require revenue to retain control of Houthi-controlled territory and to fund their military operations to achieve their ultimate objective to control all of Yemeni territory.[8] Saudi recent measures against the Houthis, including traffic controls on Houthi-controlled ports and airports, have restricted the flow of fuel, funding, weapons, and goods into Houthi-controlled territory and rendered the group unable to pay its officials.[9] US airstrikes during Operation Rough Rider in 2025 also damaged facilities at Houthi-controlled Hudaydah Port and supply lines between Hudaydah and Sanaa, further hindering Houthi commercial and smuggling activity.[10]

The Houthis appear to be threatening Saudi Arabia’s international partners to isolate Saudi Arabia and prevent Saudi partners from forming a coalition against Houthi efforts in the Red

Sea. The Houthis damaged an Italian Eurofighter Typhoon fighter jet during an attack targeting King Fahd Air Base in Taif, Saudi Arabia, on September 17.[11] It is unclear whether the Houthis intentionally targeted the aircraft. Senior Italian government sources stated that Italy redeployed Italian military aircraft from the King Fahd Air Base to elsewhere following the attack, according to Italian media on September 22.[12] Houthi officials reportedly told Italian officials that the group does not seek conflict with Italy but questioned why Italy had deployed military aircraft to Saudi bases.[13] Italy has long deployed fighter jets at Saudi bases as part of the global coalition to defeat the Islamic State of Iraq and al Sham (ISIS) but deployed, alongside other countries, additional fighter jets to Saudi Arabia in March 2026 to protect Gulf states' airspace from Iranian attacks.[14] The Houthis may perceive this air defense mission as a potential hindrance to the group's offensive campaign against Saudi Arabia, which consists chiefly of attacks on Saudi oil facilities, amid various countries' defensive support for Saudi Arabia.[15] **A Houthi attack that damages European aircraft deployed to Saudi Arabia to support Saudi efforts to defend against Iranian attacks also supports Iranian objectives to break the coalition defending Gulf states against Iran.**

The Houthis have made threats against other Saudi partners. Abdulmalik also warned Pakistan and Turkey, Saudi Arabia's mutual defense treaty allies under the "Mecca Pact," not to support Saudi Arabia on September 21, for example.[16] The Houthis view their strike campaign in Saudi Arabia as fundamental to efforts to maximize Saudi political and economic costs, which the group believes will compel Saudi Arabia to submit to Houthi demands.[17] Continued Houthi threats, if effective in deterring Saudi allies, would accordingly weaken Saudi air defenses, increase the efficacy of the Houthis' strike campaign, and keep Saudi Arabia relatively isolated and unsupported against the group.

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

Iranian President Masoud Pezeshkian and Interior Minister Eskandar Momeni met with Pakistani Interior Minister Mohsen Naqvi in Tehran on September 21. Naqvi's visit to Tehran

comes amid Pakistan's attempts to pressure Iran to force the Houthis to end or limit their campaign against Saudi Arabia, Pakistani mediation efforts between the United States and Iran, and continued economic and border security issues between Iran and Pakistan.[18] An economy-focused Iranian media outlet speculated on September 22 that the meeting could have been about Pakistan's mediation between the United States and Iran, finding ways to reduce tensions between Saudi Arabia and the Houthis, and bilateral cooperation, likely in reference to trade and border security.[19] This outlet's speculation is consistent with a September 18 *Financial Times* (FT) report that Pakistani Army Chief Asim Munir had asked Iranian officials to force the Houthis to stop their attacks on Saudi territory and oil infrastructure.[20] Bloomberg reported on August 24 that Munir and Naqvi met with Pezeshkian and other Iranian officials to reduce tensions between the United States and Iran amid kinetic exchanges in the Strait of Hormuz.[21] Iran and Pakistan agreed in July to expand bilateral trade and cross-border commerce from three billion US dollars to at least 10 billion US dollars, which ISW-CTP continues to assess is part of a likely Iranian effort to mitigate the economic effects of the US naval blockade and sanctions on the Iranian economy.[22]

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

Yemeni government-aligned forces continued to engage Houthi fighters in mountainous areas near Jabal Kahbub on the Lahij-Taiz Governorate border in southwestern Yemen on September 21 and 22.[23] Jabal Kahbub sits approximately 30 kilometers north of Houthi positions by the Bab al Mandeb Strait, which would provide Yemeni government-aligned forces advantageous high ground above Houthi forces along the relatively open Red Sea coastal plain. Homeland Shield Forces and Southern Giants Brigades, which are military factions aligned with the Yemeni government, re-established control of Jabal Kahbub on the Lahij-Taiz Governorate border on September 17 and have since been defending their position.[24]



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Iran Update, September 23, 2026



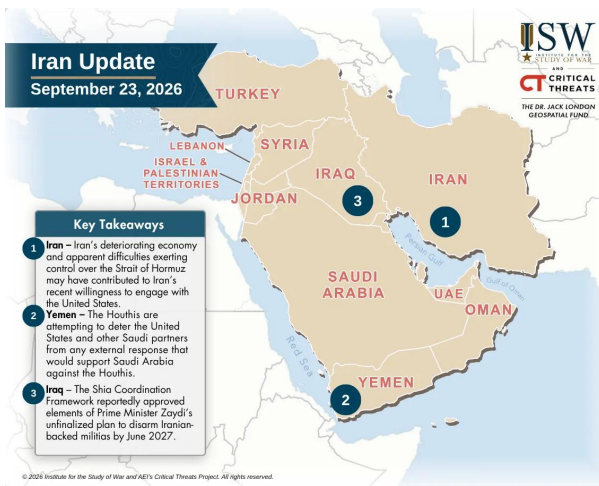
Parker Hempel, Carolyn Moorman, Ben Rezaei, Adham Fattah, Benjamin Schmida, Kelly Campa

Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Iran's deteriorating economy and apparent difficulties exerting control over the Strait of Hormuz may have contributed to Iran's recent willingness to engage with the United States. Iran's renewed engagement with the United States does not indicate that the regime has softened its negotiating position or is willing to make meaningful concessions on core demands.
2. The Houthis are attempting to deter the United States and other Saudi partners from any external response that would support Saudi Arabia against the Houthis.
3. ISW-CTP is considering five possible Houthi military courses of action (COAs) that the group could take against the United States or other Saudi partners if these parties increase their military support for Saudi Arabia against the Houthis, including by providing defensive air support or conducting airstrikes on Houthi targets in Yemen. In a most likely COA (MLCOA), the Houthis expand their naval blockade against Saudi vessels to include vessels affiliated with the United States or other Saudi partners.
4. The Shia Coordination Framework, which includes multiple Iranian-backed Iraqi actors, has reportedly approved some details of an unfinalized Iraqi government plan to disarm Iranian-backed Iraqi militias by June 2027. The Iraqi militias will almost certainly exploit certain provisions of Iraqi Prime Minister Ali al Zaydi's plan to retain their arms.
5. Iraq's most prominent militias continue to condition disarmament on demands that the federal government is highly unlikely to meet, which indicates that they have no intention to disarm.



Toplines

Iran’s deteriorating economy and apparent difficulties exerting control over the Strait of Hormuz may have contributed to Iran’s recent willingness to engage with the United States.

US Special Envoy to the Middle East Steve Witkoff and Jared Kushner communicated indirectly with Iranian Foreign Affairs Minister Abbas Araghchi through Qatari mediators on the sidelines of the UN General Assembly (UNGA) in New York on September 22.[1] This indirect meeting is the first diplomatic engagement between US and Iranian officials since high-level talks in Burgenstock, Switzerland, on June 21, four days after both parties signed a memorandum of understanding (MoU) that ultimately collapsed a few weeks later.[2] The US-Iran indirect meeting took place several days after Iranian Supreme National Security Council (SNSC) Secretary Major General Mohsen Rezaei announced on September 19 that Iran had communicated seven conditions for beginning negotiations to the United States.[3] The regime’s state broadcasting network, Islamic Republic of Iran Broadcasting (IRIB), reported on September 22 that Iran accepted Witkoff’s request for the meeting in order to communicate Iran’s conditions for “reopening” the strait, which include lifting of the US naval blockade, the release of all frozen Iranian assets, and an end to the war across all fronts.[4] Iran has held these core demands since Spring 2026. The sequence of events suggests that Iran signaled its openness to engagement with the United States ahead of UNGA, but Iran’s willingness to engage the United States does not indicate that it is willing to make any meaningful concessions. The timing of this engagement is nevertheless notable given the mounting economic pressure on Iran.[5]

Iran’s worsening economic conditions are likely in part driving its renewed engagement with the United States. The US blockade on Iranian ports is preventing Iran from generating revenue from its illicit international oil trade.[6] Iran is facing a shortage of foreign currency reserves and access to US dollars, which is exacerbated by intensifying US economic pressure.[7] US sanctions have also targeted the Iranian regime’s other illicit channels and ability to move cash around.[8] US Treasury Secretary Scott Bessent warned on September 21, for example, that foreign companies providing fuel or other services to Iranian airlines would risk facing secondary sanctions.[9] Iraq subsequently suspended Iranian flights to Baghdad.[10] The United Arab Emirates (UAE), which has traditionally served as a hub for Iranian trade and illicit financing, has also started reducing economic ties with Iran as part of the United States and its allies’ economic pressure campaign. The UAE Central Bank barred Iranian Bank Melli branches from conducting transactions in the UAE on September 23, further restricting Iran’s access to regional financial networks.[11] Iranian officials who previously supported the MoU to obtain economic relief may view renewed diplomatic engagement with the United States as a means of securing further relief and preventing an economic collapse. Iranian officials, including President Masoud Pezeshkian, reportedly

pressed Supreme Leader Mojtaba Khamenei to accept the previous US-Iran MoU in June because of the significant pressure that the US naval blockade was placing on the Iranian economy.[12] Pezeshkian and other “pro-concessions” figures, including Parliament Speaker Mohammad Bagher Ghalibaf, have warned in recent weeks that Iran’s current deteriorating economic conditions are unsustainable.[13]

Iran’s diminishing ability to exert control over the Strait of Hormuz may also have motivated Iran’s willingness to engage with the United States.[14] Iran continues to pose a serious threat to commercial shipping, but the regime has appeared to be either unwilling or unable to enforce its control over the strait in recent weeks.[15] Increased commercial vessel transit levels indicate that Iran is having difficulty in preventing some commercial vessels from using the southern route, for example. Maritime data tracking firm Tanker Trackers reported on September 23 that approximately 13 million barrels of non-Iranian oil per day continued to pass through the strait despite the conflict and Iranian restrictions.[16] ISW-CTP has observed several indicators that suggest that Iranian forces are facing operational restraints that are limiting Iran’s ability to attack vessels and force them into Iranian routes.[17] The regime has also struggled to secure buy-in from the other Persian Gulf littoral states for Iranian diplomatic efforts to solidify Iranian management over the strait, as required under the MoU.[18] Iranian officials may view renewed negotiations as another opportunity to secure some formalization of its authority over the waterway. The June 2026 MoU’s language required Iran to reach an agreement with the Gulf states that Iran attempted to use to codify its own management over shipping lanes in the strait, for example.

Iran’s renewed engagement with the United States does not indicate that the regime has softened its negotiating position or is willing to make meaningful concessions. Rezaei stated on September 23 that Iran will neither formally negotiate nor “reopen” the strait until the United States first meets Iran’s conditions.[19] Iran’s claim that it would “reopen” the strait under a deal may refer to permitting greater commercial traffic under an Iranian-managed system rather than Iran’s relinquishing of its claimed authority over shipping. Iran’s indirect meeting with the United States also does not necessarily indicate that regime officials have overcome internal disagreements about how Iran should engage with the United States. These disagreements significantly complicated US efforts to negotiate with Iran in previous months. Iranian hardline actors have criticized Araghchi for participating in the UNGA meeting.[20] Islamic Revolutionary Guard Corps-affiliated (IRGC) Tasnim News Agency argued that intermediaries had already communicated Iran’s conditions, claimed that Iranian policy-making bodies opposed the contact, and demanded that Araghchi explain who authorized the meeting.[21] The backlash from hardliners is likely in part targeting a domestic Iranian audience.[22] Rezaei separately stated that he, Pezeshkian, and Araghchi jointly decided to communicate Iran’s conditions, which suggests that senior officials authorized the contact in some form.[23]

The Houthis are attempting to deter the United States and other Saudi partners from any external response that would support Saudi Arabia against the Houthis. A Houthi military commentator with ties to the Houthi Defense Ministry, Brigadier General Abed Mohammed al Thawr, told Agence France-Presse (AFP) on September 23 that the Houthis will attack US interests within Houthi projectile range if the United States conducts airstrikes targeting the Houthis in Yemen or provides air support to Saudi Arabia.[24] Houthi drones can range up to nearly 2,000 kilometers, as demonstrated in a July 2024 Houthi drone attack on Tel Aviv.[25] The commentator warned that the Houthis view their control of the Bab al Mandeb as a “red line” and that the group will fight to retain it, including by “completely” halting shipping if deemed necessary.[26] Thawr was a Houthi Brigadier General and member of the Houthi Defense Ministry as recently as August 2025 and has previously spoken to regional media on behalf of the Houthis.[27] Thawr now primarily acts as a military advisor and military commentator for Houthi media.[28] The Houthi warning to the United States is likely in response to recent Western reporting that the US President Donald Trump considered launching US airstrikes against Houthi targets in Yemen but decided to refrain “for the time being.”[29]

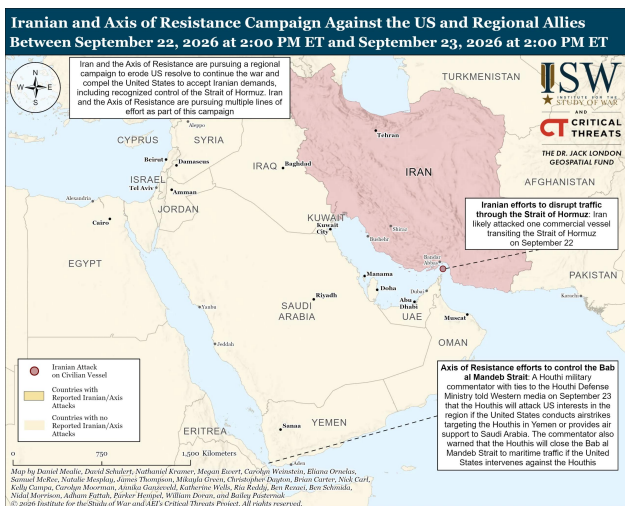
The Houthis have threatened Saudi Arabia's international partners to isolate Saudi Arabia and prevent Saudi partners from forming a coalition against Houthi efforts in the Red Sea. The Houthis likely calculate that limiting international involvement improves conditions for the Houthis to secure their objectives, which include acquiring key economic concessions from Saudi Arabia and asserting Houthi authority over the Bab al Mandeb.[30] Houthi officials, including Houthi Supreme Leader Abdulmalik al Houthi, have warned Turkey and Pakistan against supporting Saudi Arabia, for example.[31] Pakistan and Turkey are parties to a mutual defense pact with Saudi Arabia.[32]

The Houthis have simultaneously pursued diplomatic efforts with the United States that are likely intended to prevent the United States or its partners from supporting or joining the Saudi offensive campaign against the Houthis. Houthi officials reportedly told US officials in Muscat on September 16 that the Houthis do not intend to target US vessels and remain committed to the May 2025 ceasefire.[33] Trump has also repeatedly stated that the United States is in contact with the Houthis and that the group continues to insist that they do not seek conflict with the United States.[34]

ISW-CTP is considering five possible Houthi military courses of action (COAs) that the group could take against the United States or other Saudi partners if these parties increase military support for Saudi Arabia. The Houthis have explicitly warned Saudi partners, including the United States, against intervening militarily against the Houthis, which could include striking Houthi targets in Yemen, increasing defensive air support for Saudi Arabia, or forming a coalition against Houthi efforts in the Red Sea. These COAs are not mutually exclusive, and the Houthis could pursue a combination of these COAs. The Houthis could also decide to progress through several of the below COAs to gradually increase pressure on the United States and other parties to compel these countries to end military support for Saudi Arabia against the Houthis.

- **In a most likely course of action (MLCOA), the Houthis expand their naval blockade against Saudi vessels to include vessels affiliated with the United States or other Saudi partners.** The Houthis previously expanded a limited campaign to disrupt Israeli shipping in the Red Sea in 2023-2025 by imposing wider parameters for vessels that "violated" the Houthi blockade.[35] The Houthis responded to US and UK airstrikes in Yemen in January 2024 by targeting US and UK-linked vessels as part of their campaign against international shipping.[36] The Houthis have enforced a blockade on Saudi vessel traffic through the Bab al Mandeb Strait since July 22 by attacking multiple Saudi and Saudi-affiliated vessels in the Red Sea and Bab al Mandeb.[37] The Houthis could expand this Saudi blockade to include vessels affiliated with the United States and other Saudi partners. The Houthis may further view direct US support for Saudi Arabia, such as strikes on Houthi targets in Yemen, as a violation of the May 2025 US-Houthi ceasefire and decide to renege upon the group's previous pledge to refrain from targeting US vessels.[38]
- The Houthis' new positions along the Red Sea coast — particularly on islands in and near the Bab al Mandeb — can facilitate Houthi attacks on Saudi partner-affiliated vessels, given that these positions enabled the Houthis to use a broader range of weapons systems to target shipping lanes.[39] The Houthis have historically employed a range of capabilities to threaten maritime traffic and disrupt shipping, including anti-ship ballistic missiles, unmanned surface vessels (USVs), and even hijacking commercial vessels.[40] The Houthis conducted these attacks while based in the Houthi-controlled Hudaydah Port, which is located nearly 250 kilometers north of the Bab al Mandeb Strait. The Houthis' new positions enable them to deploy tactical drones, including short-range drones or hexacopter drones to attack and harass shipping from these new positions closer to the Bab al Mandeb Strait.[41] The Houthis' new positions near the Bab al Mandeb, such as al Aradi, Lahij Governorate, also put them within artillery range of the shipping lanes in the Bab al Mandeb.[42]

- **The Houthis attempt to halt international shipping through the Bab al Mandeb and “close” the strait to drive concessions from the United States and Saudi partners.** Thawar warned that the Houthis could “completely” halt shipping if the group deems it necessary.[43] The Houthis continue to claim that the group only intends to target Saudi-linked vessels, but Houthi officials and Houthi-aligned individuals have increasingly asserted the Houthis’ authority over the strait in recent days.[44] The Houthis also appear to be attempting to set conditions to establish themselves as the legitimate authority and guarantor of passage through the Bab al Mandeb, including by preparing to deploy a Houthi “coast guard” to surveil the strait and by investigating the installation of maritime sensing capabilities in newly seized Houthi territory with support from the IRGC.[45] The Houthis have previously referenced the Iranian precedent for assuming control over international chokepoints as a means through which to drive concessions from an adversary or adversaries.[46]
- **The Houthis launch attacks against US and Saudi partner naval vessels operating in the Red Sea.** The Houthis repeatedly launched drones and missile attacks targeting US Navy vessels in the Red Sea in 2024.[47] The Houthis also deployed USVs against US Naval and commercial vessels in 2024.[48] The Houthis may expand attacks to US and Saudi partner naval vessels to deter greater military support for Saudi Arabia and assert control over the Bab al Mandeb, especially if the Houthis also attempt to halt commercial shipping through the strait.
- **The Houthis conduct attacks targeting US and Saudi partner forces operating from Saudi territory.** US servicemembers are currently stationed in Saudi Arabia to provide intelligence, targeting, and air defense support to Saudi Arabia.[49] The Houthis could increasingly and deliberately target Saudi bases where US and Saudi partner military forces are located and operating from, particularly in a scenario in which the United States stations and launches airstrikes against the Houthis from Saudi territory. Houthi military spokesperson Yahya Sarea regularly claims that the Houthis are able to track and locate Saudi military bases from which Saudi aircraft conduct airstrikes on Houthi targets in Yemen.[50] Other Saudi partners, such as the United Kingdom, provide defensive military support to Saudi Arabia in the wake of Iranian and Houthi attacks.[51] A Houthi projectile damaged an Italian Eurofighter Typhoon fighter jet during an attack targeting King Fahd Air Base in Taif, Saudi Arabia, on September 17.[52] It is unclear whether the Houthis intentionally targeted the aircraft. Houthi-affiliated media recently claimed on September 19 that the Houthis possess an extensive target bank of Saudi military sites.[53]
- **The Houthis or other Axis of Resistance groups launch attacks on US military bases in Gulf states from positions in Iraq.** Houthi forces in Iraq have increasingly coordinated with Iranian-backed Iraqi militias to launch coordinated attacks targeting Saudi Arabia in recent months.[54] The Houthis have also directly launched attacks from Iraq targeting Saudi oil infrastructure.[55] The Houthis could attack US military bases in neighboring countries surrounding Iraq, including other Gulf states, to increase the human and political costs for the United States and deter continued military support to the Saudi campaign against the Houthis in Yemen. Iranian-backed Iraqi militias have repeatedly attacked US military bases in Iraq and neighboring countries since the start of the US-Iran War in February 2026.[56]



The Shia Coordination Framework, which includes multiple Iranian-backed Iraqi actors, has reportedly approved some details of an unfinalized Iraqi government plan to disarm Iranian-backed Iraqi militias by June 2027. The Iraqi militias will almost certainly exploit certain provisions of Iraqi Prime Minister Ali al Zaydi's plan to retain their arms. Zaydi recently outlined a two-phased plan to disarm the militias. Under the first phase, the Iraqi militias would agree to refrain from conducting attacks for 90 days and the United States would abstain from attacking the militias during this period.[57] The militias would then begin to hand over their weapons to the government under the second phase in a process that would end in June 2027.[58] It is unclear how the federal government would enforce any aspect of this plan, including preventing the militias from conducting attacks. Baghdad-based Iraqi sources revealed to Qatari-owned, UK-based media on September 22 that unspecified framework members and senior Iraqi Shia officials have approved previously unreported, additional details of Zaydi's plan.[59] Zaydi and other framework members have said that the plan's full details will be released on September 30, which is the date of the withdrawal of US-led coalition forces from Iraq and Zaydi's previous deadline for militia disarmament.[60] The framework agreed to create a new directorate in the Popular Mobilization Forces' (PMF) administrative body, the Popular Mobilization Commission, to receive militia weapons and determine storage and usage protocols for them under Iraqi federal government supervision.[61] Iranian-backed Iraqi militias and actors have already successfully infiltrated the PMF, which heightens the risk that the Iraqi militias will maintain access to their arms under the plan.[62] The Iraqi sources revealed to Qatari-owned, UK-based media that the plan provides immunity and the right to participate and run in Iraqi elections if militia members abstain from participating in attacks or forming new militias.[63] The Iraqi federal government is likely unable to enforce this stipulation given the covert nature of the militias. The Iraqi militias have also used facade groups to obfuscate their kinetic activity for decades.[64]

Iraq's most prominent militias continue to condition disarmament on demands that the federal government is highly unlikely to meet, which indicates that they have no intention to disarm. The Iraqi sources speaking to Qatari-owned, UK-based media said that four unspecified Iraqi militias that have consistently refused to disarm agreed to the plan's June 2027 deadline for disarmament, provided that the federal government met several demands.[65] The four militias' demands included the complete withdrawal of US and Turkish forces from Iraq, Iraq's acquisition of advanced air defense systems, and removal of Iranian anti-regime groups from Iraqi Kurdistan.[66] The Islamic Resistance of Iraq, which is an Iraqi militia coalition that includes Kataib Hezbollah, Harakat Hezbollah al Nujaba, and Kataib Sayyid al Shuhada, has previously listed many of these preconditions for disarmament, which suggests that the "four unspecified Iraqi militias" may include groups within the Islamic Resistance of Iraq.[67] The militias are likely including conditions that the federal government will struggle to implement in order to maintain a plausible basis on which to remain armed. Zaydi mentioned

in a September 21 *New York Times* (NYT) interview that he “aim[s]” to integrate the four Iraqi militias who refuse to disarm as individuals within the PMF, likely referring to at least Kataib Hezbollah, Kataib Sayyid al Shuhada, and Harakat Hezbollah al Nujaba.[68] The premise of integrating these militias into the PMF as “individuals” suggests that Zaydi is concerned that the militias could attempt to exploit integration into the PMF, including through the process of reflagging former militias as new PMF units. Zaydi’s ability to integrate militias into the PMF as individuals, along with other options that Zaydi has considered to professionalize the PMF, depends upon militia willingness to comply with his plans in the absence of proper enforcement mechanisms from the Iraqi federal government.

Zaydi’s attempt to obtain US support for this plan is consistent with his continued efforts to balance between the United States and Iranian-backed Iraqi actors. The United States has applied intense economic pressure on the Iraqi federal government in recent months to disarm the militias, including by temporarily cutting off Iraq’s access to its oil revenue held in the New York Federal Reserve.[69] The Iraqi sources said that Zaydi told the framework that the United States wants “measurable, practical steps” to disarm the militias.[70] Zaydi also emphasized to the framework the importance of further consultations with the United States before the plan is finalized.[71] Zaydi almost certainly discussed this plan with Trump during their September 23 meeting in New York during UNGA.[72] Zaydi has taken limited steps in recent months to crack down on the militias but has also proven himself to be somewhat responsive to Iranian-backed Iraqi actors’ pressure on him.[73] Zaydi appeared to have backed down from a plan to forcibly take back a Kataib Hezbollah stronghold to which the group had blocked federal government access for over a decade, following severe pushback by Iran and Iranian-backed Iraqi actors, for example.[74]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Nothing significant to report.

US-Iran Negotiations

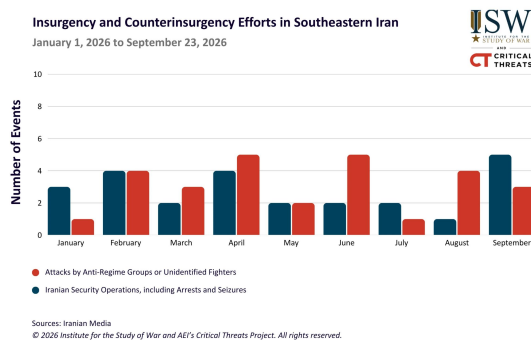
See topline section.

Iranian Domestic Affairs

Likely Mobarizoun Popular Front (MPF) fighters killed two high-ranking IRGC Ground Forces commanders in southeastern Iran on September 23. IRGC-affiliated media reported on September

23 that Iranian security forces killed five insurgents and seized their weapons during a counterinsurgency operation in Saravan, Sistan and Baluchistan.[75] A separate regime media outlet later reported that the insurgents killed IRGC Ground Forces Shahid Sajjad Operational Headquarters Commander Brigadier General Hossein Zarifi and Intelligence Commander Major Ahmad Zeraati during the operation.[76] It is unclear which incident occurred first, however. Regime media is almost certainly referring to the MPF, which is a Baloch anti-regime militant coalition with a history of attacking regime security forces and pro-regime clerics in Sistan and Baluchistan Province.[77]

The regime may increase security measures and counterinsurgency operations in the southeast in response to the killing of these two high-ranking commanders. ISW-CTP has observed a recent uptick in Iranian security operations in southeastern Iran over the past month, which will likely continue due to Zarifi and Zeraati's killing.[78] Sistan and Baluchistan Province is a hotspot for anti-regime activity, including both armed and non-armed movements. Zahedan, Sistan and Baluchistan Province, experienced significant protest activity long after the end of the Mahsa Amini protests in the rest of Iran, even after the violent regime crackdown in the province, for example.[79] The regime may calculate that it needs to increase its security efforts in Sistan and Baluchistan to discourage all kinds of anti-regime activity. It is unclear at this time how effectively the regime can suppress such activity, however, due to its ongoing internal security struggles in the northwest and the broader degradation of the regime's security forces by the United States and Israel during the war.[80]



Anti-regime media reported on September 23 that small-scale economic protests took place in northwestern Iran.[81] Anti-regime media posted footage of a group of nurses and staff from Kermanshah University of Medical Sciences protesting working conditions in front of the university building on September 22.[82] Student protests at universities are notable, given the regime's historical concern about anti-regime unrest among young people. Student protesters spearheaded the Mahsa Amini movement in 2022, for example.[83] Anti-regime media separately posted footage of protests by employees of an Iranian oil company in Ahvaz, Khuzestan Province, on September 23.[84] The workers demanded settlement of overdue financial claims, comprehensive reforms to wage and benefit structures, and improvements to workplace safety standards.[85] The economic roots of the protests are notable because the Winter 2026 protests — Iran's largest in modern history — emerged due to economic grievances but rapidly evolved into widespread anti-regime protests.[86]

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

See topline section.

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Iran Update, September 24, 2026



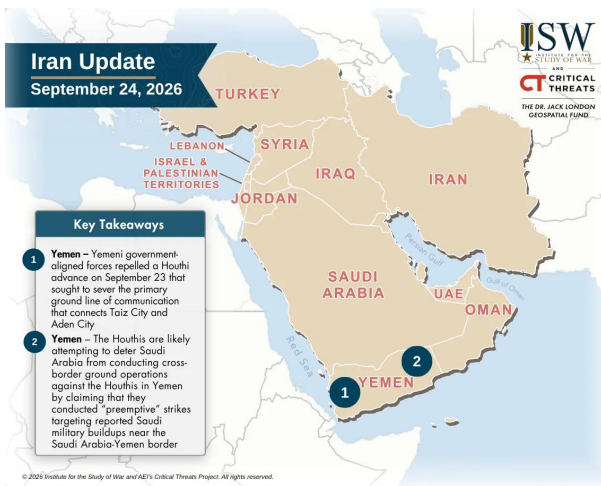
Benjamin Schmida, Bailey Pasternak, Katherine Wells, Ben Rezaei, Nidal Morrison, William Doran, Parker Hempel, Ria Reddy, Annika Ganzeveld

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. Yemeni government-aligned forces repelled a Houthi advance on September 23 that sought to sever the primary ground line of communication (GLOC) that connects Taiz City and Aden City. Houthi control over the Taiz-Aden GLOC would effectively represent an encirclement of Yemeni government-aligned forces in Taiz City, as the Hijat al Abd road is the only effective main supply route (MSR) that connects Taiz City to the rest of Yemeni government-controlled territory.
2. The Houthis likely seek to capture the Taiz-Aden GLOC to impose multiple dilemmas on Yemeni government-aligned forces. An effective Houthi encirclement of Yemeni government-aligned forces in Taiz City could set conditions for Houthi forces to seize Taiz City and other parts of the governorate, which would provide the Houthis with strategic high ground over their recently captured Red Sea coastal positions, and improve the Houthis' ability to threaten the Yemeni government's capital in Aden City.
3. The Houthis are likely attempting to deter Saudi Arabia from conducting cross-border ground operations against the Houthis in Yemen by claiming that they conducted "preemptive" strikes targeting reported Saudi military buildups near the Saudi Arabia-Yemen border.
4. The People's Republic of China supplied dual-use technology to Iran during the war to support Iran's drone and missile programs and may be transporting goods to Iran by air to circumvent the US naval blockade on Iranian ports.



Toplines

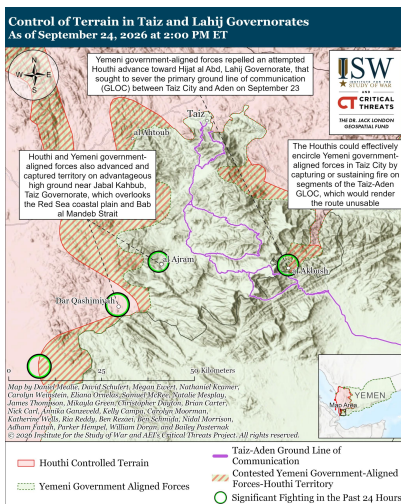
Yemeni government-aligned forces repelled a Houthi advance on September 23 that sought to sever the primary ground line of communication (GLOC) that connects Taiz City and Aden City. Houthi forces reportedly attempted to advance from al Akbush in Hayfan District southwestward toward Hijat al Abd, Lahij Governorate, in order to sever the primary GLOC connecting Taiz and Aden City on September 23, according to multiple Yemeni government-aligned sources.[1] A DC-based Yemen analyst reported on September 23 that Houthi forces severed the Taiz-Aden GLOC for less than an hour before Yemeni government-aligned forces, including the Yemeni National Army, Southern Giants Brigades, and local Popular Resistance fighters, recaptured the Hijat al Abd area.[2] Yemeni government-aligned forces conducted at least three airstrikes on Houthi positions in al Akbush to prevent Houthi advances on the GLOC on September 23, according to Saudi media and the Yemen analyst.[3] Yemeni government forces and the Yemen analyst reported that government forces retained control of the Taiz-Aden GLOC in Hijat al Abd and continued to use the resupply route on September 24.[4]

Houthi control over the Taiz-Aden GLOC would effectively represent an encirclement of Yemeni government-aligned forces in Taiz City, as the Hijat al Abd road is the only effective main supply route (MSR) that connects Taiz City to the rest of Yemeni government-controlled territory.[5] A DC-based Yemen analyst assessed on September 10 that Yemeni government-aligned forces would struggle to resupply Taiz positions via alternative mountain roads, which are “far more difficult and expensive.”[6] Houthi forces likely do not need to seize the entirety of the Taiz-Aden GLOC to sever government reinforcements and resupply because sustained Houthi fire on the Hijat al Abd MSR or other sections could make the route too dangerous to use. Houthi forces previously advanced eastward from western Taiz Governorate toward the Taiz-Aden GLOC in al Turbah, Taiz Governorate, on September 14 and 21.[7] Hijat al Abd is less than 10 kilometers east of al Turbah.

The Houthis likely seek to capture the Taiz-Aden GLOC to impose multiple dilemmas on Yemeni government-aligned forces. An effective Houthi encirclement of Yemeni government-aligned forces in Taiz City by capturing the GLOC could:

- Set conditions for Houthi forces to seize Taiz City and other parts of the governorate, which would provide the Houthis with strategic high ground over their recently captured Red Sea coastal positions.
- Improve the Houthis’ ability to threaten the Yemeni government’s capital in Aden City.
- Provide the Houthis with a propaganda victory, as locals in Taiz Governorate have historically opposed Houthi rule and the Houthis have attempted to capture Taiz for nearly 15 years.[8]

- Effectively resurrect the borders of the northern Yemen Arab Republic—with the exception of parts of Marib and Jawf governorates — which could provide the Houthis with political legitimacy for a separate northern Yemeni state.[9]
- Relieve Houthi forces to pursue the group’s other objectives, such as the seizure of oil resources in Marib Governorate, as well as further expansion and consolidation of Houthi positions along the Red Sea Coastal Plain.
- Provide the Houthis with greater leverage in negotiations for a peace settlement with the Yemeni Government and Saudi Arabia.



The Houthis are likely attempting to deter Saudi Arabia from conducting cross-border ground operations against the Houthis in Yemen by claiming that they conducted “preemptive” strikes targeting reported Saudi military buildups near the Saudi Arabia-Yemen border.[10] Houthi military spokesperson Brigadier General Yahya Saree stated on September 24 that the Houthis launched “dozens” of ballistic missiles and drones at a Saudi military base in al Tuwal, Najran Province, Saudi Arabia, which is located approximately 1.5 kilometers from the Yemeni border, on September 23.[11] Saree claimed that the Houthis conducted the attack in response to observed Saudi troop buildups in the area.[12] Saree added that the Houthis killed or injured “hundreds” of Saudi, Yemeni, and Sudanese soldiers in the attack.[13] This marks the first time that the Houthis have claimed a preemptive attack against Saudi Arabia since the Houthis announced their blockade against Saudi Arabia on July 20.[14] ISW-CTP has not observed any indicators that Saudi Arabia was amassing forces in al Tuwal prior to the Houthis’ attack. Saudi Arabia has not acknowledged the attack on al Tuwal at the time of this writing. The group’s justification for its recent attack, regardless of whether the Houthi claims of Saudi troop movements are true, is likely an effort to try to deter Saudi Arabia from deploying its forces to the Saudi Arabia-Yemen border and conducting cross-border ground operations by indicating the Houthis’ ability and willingness to attack Saudi forces.[15] Saree emphasized on September 24 that the Houthis will target future Saudi troop buildups along the border until Saudi Arabia ceases all kinetic activity against the Houthis in Yemen and concedes to the Houthis’ demands.[16]



The People’s Republic of China (PRC) supplied dual-use technology to Iran during the war to support Iran’s drone and missile programs and may be transporting goods to Iran by air to circumvent the US naval blockade on Iranian ports. The *Wall Street Journal*, citing Iranian customs data, reported on September 23 that PRC aircraft delivered roughly 1,300 shipments of dual-use technology, including technology that could support drone and missile guidance production, to Iran’s Defense and Armed Forces Logistics Ministry between January and June 2026.[17] One shipment contained GPS tracking devices, electric motors, and aircraft engine parts, while a dozen other shipments included parts worth more than \$6 million USD that could support flight-control units for precision-guided weapons.[18] The *Wall Street Journal* also highlighted a notable increase in Iran-PRC air traffic since June 2026, which may reflect Chinese support for Iranian military reconstitution as well as Iran and the PRC’s attempts to circumvent the US naval blockade.[19]

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

The Mobarizoun Popular Front (MPF) — a coalition of Baloch anti-regime groups — continues to pose a threat to the Iranian regime by mounting effective resistance against regime counterinsurgency operations targeting the group in southeastern Iran.[20] The MPF claimed responsibility for the September 23 clash with regime forces in Saravan, Sistan and Baluchistan Province, that killed two senior Islamic Revolutionary Guards Corps (IRGC) Ground Forces officers.[21] The MPF claimed that regime forces attacked one of its positions on September 23, which prompted hours of fighting and the deployment of reinforcements.[22] The MPF killed IRGC Ground Forces Shahid Sajjad Operational Headquarters Commander Brigadier General Hossein Zarifi and Intelligence Commander Major Ahmad Zeraati during the operation.[23] The September 23 regime operation targeting the group is part of an uptick in Iranian security operations in southeastern Iran over the past month, particularly against MPF networks in Saravan.[24] The regime previously conducted a raid on MPF's hideouts in Saravan on September 12.[25] ISW-CTP previously assessed that the regime will likely intensify security measures and counterinsurgency operations in Sistan and Baluchistan Province in response to the killing of Zarifi and Zeraati.[26]

Lebanon

The Israel Defense Forces (IDF) is reducing its ground force presence in Lebanon after achieving operational objectives that advance Israel's strategic objective of destroying Hezbollah in southern Lebanon.[27] Israeli Army Radio reported on September 24 that the IDF has withdrawn the 89th (Commando) Infantry Brigade (98th Paratrooper Division), 1st (Golani) Infantry Brigade (36th Armored Division), 55th Reserve Paratrooper Brigade (98th Paratrooper Division), and 4th (Kiryati) Reserve Armored Brigade (146th Reserve Division) from southern Lebanon in recent days.[28] Israeli Army Radio also reported that the IDF deployed the 188th (Barak) Armored Brigade (36th Armored Division) and 828th (Bismalach) Training Brigade (IDF Infantry Corps) to southern Lebanon to replace the four withdrawn brigades, indicating that the IDF has reduced its ground force presence in Lebanon from eight to six brigades.[29] An IDF source told Israeli Army Radio that the low level of kinetic activity in southern Lebanon and recent IDF operational successes, including the capture of Hezbollah's tunnel network at Ali al Taher on September 3, made the force reduction feasible.[30] Hezbollah is unlikely to interpret the force reduction as a sign of Israeli capitulation or the result of Hezbollah military activity, which has remained sparse for months. An Israeli force presence consisting of six brigades in southern Lebanon is largely capable of maintaining the IDF's current military activities in southern Lebanon, which include demolishing Hezbollah infrastructure, seizing weapons, and engaging small-unit Hezbollah fighters.[31]

Iraq

The Iranian regime is likely concerned about the Iraqi government's cooperation with US efforts to target Iran's sanctions evasion networks. Iranian President Masoud Pezeshkian met with Iraqi Prime Minister Ali al Zaydi at the UN General Assembly on September 23 to discuss bilateral relations, including economic cooperation and the implementation of existing agreements.[32] Pezeshkian and Zaydi may have discussed the Iraqi government's recent decision to close Baghdad airport to Iranian planes, almost certainly in response to US Treasury Secretary Scott Bessent's warning on September 21 that foreign companies providing services to Iranian airlines would risk secondary sanctions.[33] The Iraqi government's decision to ban Iranian flights at Baghdad airport as well as Zaydi's

ongoing efforts to meet US demands regarding Iranian-backed Iraqi militia disarmament are likely driving Iranian concerns that Zaydi will cooperate with US efforts to target Iran's economy and its sanctions evasion networks.[34] Iran has historically exploited Iraqi government and financial institutions to evade sanctions, illicitly obtain US dollars, launder money, and generate revenue for Iranian-backed Iraqi militias.[35] Increased Iraqi government cooperation with these US efforts would further isolate Iran's economy and worsen its severe economic crisis.

Turkey agreed on September 23 to withdraw its forces from the Zelikan military base in Bashiqa, Ninewa Province.[36] The agreement stipulates that Turkish forces will "gradually" hand over the base to the Iraqi government over an unspecified timeline.[37] This announcement comes as the Shia Coordination Framework has reportedly considered drafting legislation to monitor the implementation of a Turkish withdrawal, possibly in response to Iranian-backed Iraqi militia demands for the expulsion of Turkish forces from Iraq.[38] Some Iranian-backed Iraqi militias have historically attacked the Zelikan base in response to Turkish regional activity that they oppose.[39]

Arabian Peninsula

Houthi and Yemeni government-aligned forces separately advanced in western Taiz Governorate on September 24 near the contested Jabal Kahbub area on the Lahij-Taiz Governorate border in southwestern Yemen.[40] Jabal Kahbub sits approximately 30 kilometers north of Houthi positions by the Bab al Mandeb Strait, which provides Yemeni government-aligned forces advantageous high ground above Houthi forces along the relatively open Red Sea coastal plain. Yemeni government-aligned forces took control of mountainous terrain around al Ajram, Taiz Governorate, according to geolocated footage published on September 23.[41] The National Resistance Forces, which is a military faction aligned with the Yemeni government, also conducted drone strikes on Houthi forces after Houthi fighters made small advances into Dar Qashimiyah, Taiz Governorate, on September 24.[42] Commercially available satellite imagery posted on September 24 indicates that the Yemeni government-aligned Southern Giants Brigades reinforced their defensive positions near Jabal Kahbub.[43] The Southern Giants Brigades have defended their positions near Jabal Kahbub against repeated Houthi attacks since September 16.[44]

Saudi air defenses intercepted six Houthi ballistic missiles in Saudi airspace near Taif and Yanbu on September 24.[45] A Greek military-operated Patriot missile battery also intercepted a Houthi drone over Yanbu on September 24.[46] The Houthis likely targeted Saudi energy infrastructure in Yanbu. The Houthi strikes follow reports that Saudi Arabia resumed transporting oil via its East-West Pipeline to Yanbu Port on September 22 after the Houthis struck multiple points along the pipeline on September 11.[47] 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.[48]

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Iran Update, September 25, 2026



William Doran, Nidal Morrison, Ben Rezaei, Carolyn Moorman, Annika Ganzeveld

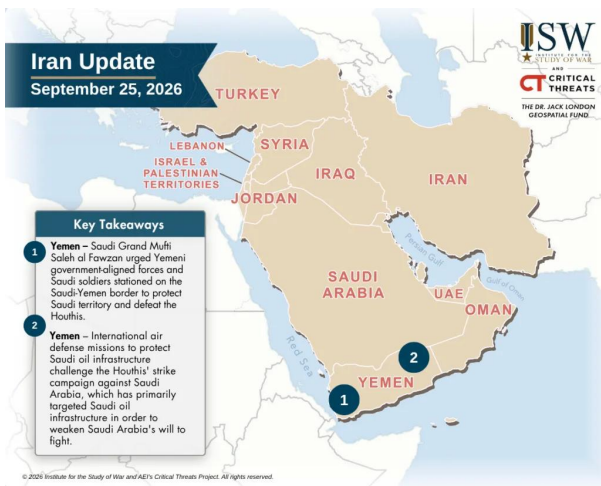
Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and the Critical Threats Project (CTP) at the American Enterprise Institute are publishing daily updates to provide analysis on developments in the Middle East over the past 24-hour period.

Note: ISW-CTP will begin publishing abbreviated weekend updates covering the Houthi-Saudi conflict beginning on September 26, 2026.

Key Takeaways

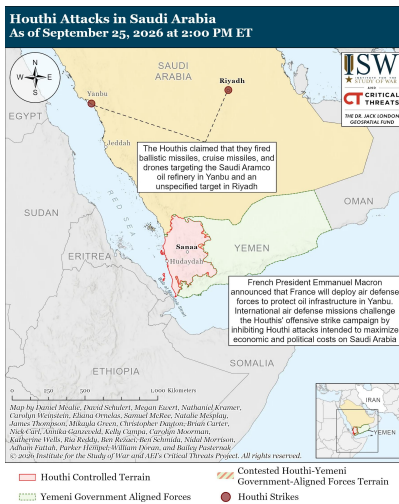
1. Saudi Grand Mufti Saleh al Fawzan issued a statement on September 24 urging Yemeni government-aligned forces and Saudi soldiers stationed on the Saudi-Yemen border to protect Saudi territory and defeat the Houthis. Fawzan's statement may be intended to compel the Houthis to abandon their strike campaign against Saudi Arabia by implicitly threatening a Saudi ground offensive against the group.
2. International air defense missions to protect Saudi oil infrastructure challenge the Houthis' offensive strike campaign against Saudi Arabia, which has primarily targeted Saudi oil infrastructure in order to weaken Saudi Arabia's will to fight. International air defense support for Saudi Arabia poses a dilemma for the Houthis by expanding international action against the group.
3. The Houthis continued to engage Yemeni government-aligned forces and threaten the primary ground line of communication (GLOC) that connects Taiz City and Aden City on September 25. Saudi-owned, UK-based media reported on September 25 that Yemeni government-aligned forces retained control of the Taiz-Aden GLOC amid Houthi attacks and infiltration attempts in Hijat al Abd and al Ashbut, Lahij Governorate, which are near the GLOC.



Toplines

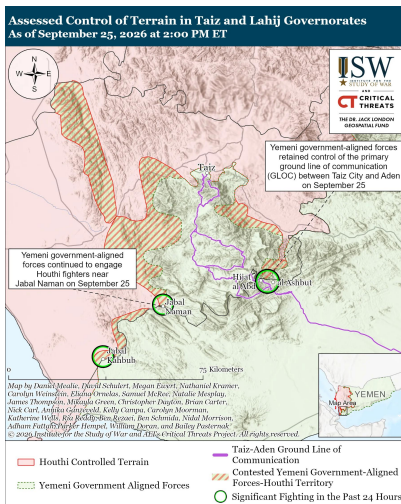
Saudi Grand Mufti Saleh al Fawzan issued a statement on September 24 urging Yemeni government-aligned forces and Saudi soldiers stationed on the Saudi-Yemen border to protect Saudi territory and defeat the Houthis.[1] Fawzan's statement may be intended to compel the Houthis to abandon their strike campaign against Saudi Arabia by implicitly threatening a Saudi ground offensive against the group.[2] Fawzan exhorted Saudi soldiers stationed on the country's borders to "repel aggression" and "punish" enemies that threaten Saudi territory, referring to the Houthis, as a religious duty.[3] The office of the Grand Mufti is closely linked to the Saudi monarchy, which is responsible for appointing the religious leader, and Grand Mufti statements on military matters are precedented but rare.[4] Saudi Arabia may intend to generate an informational effect to compel the Houthis to cease their attacks on Saudi territory without explicitly threatening a ground invasion of Houthi-controlled Yemen. ISW-CTP has not observed indicators that Saudi Arabia is preparing for an imminent ground invasion of Houthi-controlled territory in northwestern Yemen. The Houthis attacked a Saudi near-border military base in al Tuwal, Jizan Province, several hours before Fawzan's statement on September 24, which may have partly motivated Fawzan to address his statement to forces on Saudi Arabia's borders.[5]

International air defense missions to protect Saudi oil infrastructure challenge the Houthis' offensive strike campaign against Saudi Arabia, which has primarily targeted Saudi oil infrastructure in order to weaken Saudi Arabia's will to fight.[6] French President Emmanuel Macron announced on September 24 that France will deploy soldiers, radar platforms, and other military assets to protect energy infrastructure in the Red Sea port city of Yanbu, which is one of Saudi Arabia's main oil export hubs.[7] Houthi attacks on Saudi Arabia have primarily targeted oil infrastructure, particularly in Yanbu, since July 2026. The Houthis claimed that they fired ballistic missiles, cruise missiles, and drones targeting the Saudi Aramco oil refinery in Yanbu and an unspecified target in Riyadh on September 25, for example.[8] ISW-CTP continues to assess that the Houthis seek to maximize Saudi political and economic costs to compel Saudi Arabia to surrender to Houthi demands.[9] These demands include ending Saudi military activity and support for anti-Houthi forces in Yemen, lifting Saudi controls on Houthi-controlled ports and airports, paying war reparations and civil servant salaries, and granting the Houthis control over Yemen's oil and gas resources.[10] The French air defense mission comes amid broader international defensive support for Saudi Arabia, including from the United States and the United Kingdom, against the Houthis.[11] Saudi and international media reported on September 25 that military leaders from Turkey, Pakistan, and Saudi Arabia will soon hold an "urgent meeting" in Saudi Arabia to discuss military support for Saudi Arabia.[12]



International air defense support for Saudi Arabia poses a dilemma for the Houthis by expanding international action against the group.[13] Partner force air defense units protecting Saudi oil infrastructure pose a particular dilemma for the Houthis by reducing the strike campaign's effectiveness. Houthi unwillingness to challenge Saudi partners' air defense missions could convince more partners to deploy forces to protect Saudi Arabia and weaken the Houthi campaign. Saudi partners alternatively could conduct offensive military action against the Houthis, which the group has sought to avoid, if it attacked partner forces' air defense units.[14] It is unclear whether the Houthis are more willing to tolerate the prospect of broader defensive support for Saudi Arabia if they refrain from engaging partner forces or the risk of a multinational offensive campaign in Yemen if they attack these partner forces.

The Houthis continued to engage Yemeni government-aligned forces and threaten the primary ground line of communication (GLOC) that connects Taiz City and Aden City on September 25.[15] Saudi-owned, UK-based media reported on September 25 that Yemeni government-aligned forces retained control of the Taiz-Aden GLOC amid Houthi attacks and infiltration attempts in Hijat al Abd and al Ashbut, Lahij Governorate, which are near the GLOC.[16] Saudi-owned, UK-based media reported that Yemeni government-aligned forces had "reopened" the Taiz-Aden GLOC, which indicates that the Houthis had advanced within a sufficient range to disrupt its use.[17] Yemeni government-aligned forces previously repelled a Houthi advance on September 23 that aimed to sever the Taiz-Aden GLOC.[18] Houthi control over the Taiz-Aden GLOC would effectively represent an encirclement of Yemeni government-aligned forces in Taiz City, as the Hijat al Abd road is the only effective main supply route (MSR) that connects Taiz City to the rest of Yemeni government-controlled territory.[19] CTP-ISW assessed on September 24 that an effective Houthi encirclement of Yemeni government-aligned forces in Taiz could, among other effects, set conditions for the Houthis to seize Taiz City, improve the Houthis' ability to threaten the Yemeni government's capital in Aden City, and relieve Houthi forces to pursue the group's other objectives, such as consolidating Houthi positions along the Red Sea coastal plain.[20]



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

New US secondary sanctions are restricting Iran’s international air access and deepening the regime’s economic isolation. The US Treasury Department announced secondary sanctions against countries that support Iran’s aviation sector on August 24 and warned foreign firms on September 8 against providing aircraft transfers, cargo services, sales support, and other assistance to sanctioned carriers.[21] Iraq subsequently suspended Iranian flights from Tehran to Najaf, Erbil, and Sulaymaniyah on September 25.[22] Iran had originally re-routed flights to Najaf after Iraq suspended Iranian flights to Baghdad on September 23.[23] Iraq’s compliance also comes amid broader US economic pressure on the Iraqi government to disarm Iranian-backed militias.[24] The United States threatened to suspend monthly transfers of Iraq’s oil revenue held in the US Federal Reserve if Iraqi militias fail to surrender their weapons by September 30, according to two Iraqi government sources speaking to an Iraqi Kurdish outlet on September 12.[25] The elimination of the Tehran to Najaf route further reduces Iran’s regional aviation activity.[26] The United Arab Emirates (UAE), Oman, Azerbaijan, and Georgia have also

restricted or suspended the operations of Iranian airlines in their countries in recent days.[27] Iranian airlines continue to operate flights to Turkey, the People's Republic of China (PRC), and Russia, however.[28]

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

See topline section.

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Iran Update, September 26, 2026



Katherine Wells, Parker Hempel, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET.

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

Note: ISW-CTP will begin publishing abbreviated weekend updates covering the Houthi-Saudi conflict beginning on September 26, 2026.

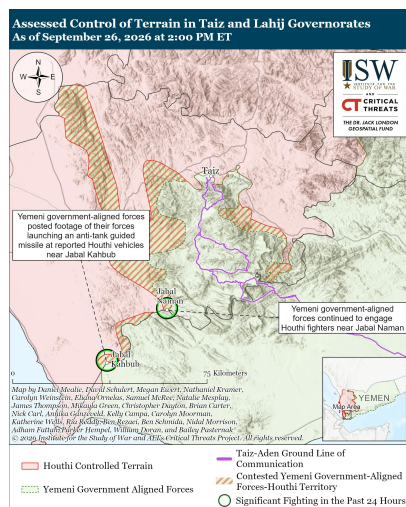
Key Takeaways

1. Houthi and Yemeni government-aligned forces continue to fight over contested high ground overlooking Houthi positions and ground lines of communication (GLOC) near the Bab al Mandeb Strait.
2. Saudi and Yemeni government-aligned forces continue to target Houthi weapons stockpiles and GLOCs on the eastern, southwestern, and northern fronts in Yemen. Houthi military spokesperson Yahya Sarea claimed that Saudi Arabia launched 27 airstrikes targeting bridges and roads in eastern and northern Yemen.
3. The Houthis continued to conduct drone and missile attacks targeting Saudi Arabia and threatened to conduct attacks against Saudi command-and-control sites if Saudi Arabia violates unspecified Houthi "red lines."
4. The Saudi, Pakistani, and Turkish Armed Forces chiefs met in Riyadh on September 25 to discuss military cooperation. Pakistan and Turkey are parties to a mutual defense pact with Saudi Arabia.

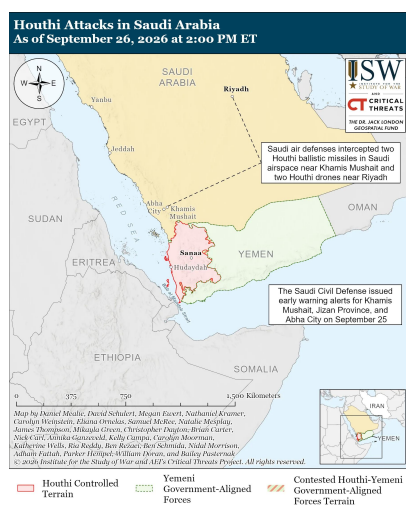
Toplines

Houthi and Yemeni government-aligned forces continue to fight over contested high ground overlooking Houthi positions and ground lines of communication (GLOC) near the Bab al Mandeb Strait. Yemeni government-aligned forces claimed on September 25 that they seized Houthi positions on Jabal Naman on the Lahij-Taiz Governorate border in southwestern Yemen, while the Houthis later claimed that they repelled these advances on September 26.[1] ISW-CTP is unable to verify either of these claims. An open-source intelligence (OSINT) account on X geolocated a Yemeni government-

aligned National Shield Forces drone strike on a Houthi position at Jabal Naman on September 25.[2] The same OSINT account geolocated engagements between Yemeni government-aligned forces and the Houthis on Jabal Naman on September 26.[3] Yemeni government-aligned forces separately posted footage on September 25 of their forces launching anti-tank guided missiles at Houthi vehicles near Jabal Kahbub, which is approximately 30 kilometers north of Houthi positions by the Bab al Mandeb Strait.[4]



Saudi and Yemeni government-aligned forces continue to target Houthi weapons stockpiles and GLOCs on the eastern, southwestern, and northern fronts in Yemen. Saudi and Yemeni government-aligned forces launched two drone strikes targeting a Houthi weapons depot and a vehicle carrying military equipment in Jubah District in southern Marib Governorate and al Kasara in northwestern Marib Governorate, respectively, on September 26, according to Saudi media.[5] Houthi military spokesperson Yahya Sarea claimed that Saudi Arabia launched 27 airstrikes targeting bridges and roads in Taiz, Marib, Saada, Amran, Ibb, and Hajjah governorates in eastern and northern Yemen.[6] These strikes were likely intended to disrupt the Houthis' ability to use key GLOCs. An OSINT account on X shared footage from September 26 of damage to al Dalil Bridge in al Makhadir District in Ibb Governorate following Saudi airstrikes.[7] The bridge is located on a GLOC between Sanaa and the frontline near Taiz in southwestern Yemen. The strike on this bridge was likely intended to disrupt the Houthis' ability to transport supplies and resources from the Houthi capital to the frontline near Taiz.



The Houthis continued to conduct drone and missile attacks targeting Saudi Arabia and threatened to conduct attacks against Saudi command-and-control sites if Saudi Arabia violates unspecified Houthi "red lines." Saudi air defenses have intercepted two Houthi ballistic

missiles near Khamis Mushait and two Houthi drones near Riyadh since ISW-CTP's last data cutoff at 2:00 PM ET on September 25.[8] The Saudi Civil Defense issued early warning alerts for Khamis Mushait, Jizan Province, and Abha City on September 25.[9] Houthi Defense Minister Mohammed al Atifi and Houthi Chief of Staff Yusuf al Madani threatened additional drone and missile attacks against Saudi military bases, strategic interests, and economic targets throughout Saudi Arabia on September 25.[10] The officials also warned that the Houthis could attack Saudi command-and-control sites if Saudi Arabia crossed the Houthis' "red lines," though they did not specify what those red lines are.[11] The officials further stated that Saudi alliances will not protect the kingdom from Houthi attacks.[12] This Houthi threat comes amid recent pledges by the United Kingdom and France to provide defensive military support against Houthi attacks.[13] The Saudi, Pakistani, and Turkish Armed Forces chiefs also met in Riyadh on September 25 to discuss military cooperation.[14] Pakistan and Turkey are parties to a mutual defense pact with Saudi Arabia.[15]

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

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

See topline section.

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Endnotes

- [1] <https://www.4may dot net/news/162941>; <https://x.com/TvAlmasirah/status/2103849993627197658>
- [2] <https://x.com/Me1Ray/status/2103684596231745809?s=20>
- [3] <https://x.com/Me1Ray/status/2103874635096113417?s=20>
- [4] <https://x.com/Alsakaniali/status/2103571681226657969?s=20>;
<https://understandingwar.org/research/middle-east/iran-update-september-24-2026/>
- [5] <https://www.alhadath dot net/yemen/2026/09/26/%D8%A7%D9%84%D9%82%D9%88%D8%A7%D8%AA-%D8%A7%D9%84%D9%8A%D9%85%D9%86%D9%8A%D8%A9-%D8%AA%D8%B3%D8%AA%D9%87%D8%AF%D9%81-%D9%85%D8%AE%D8%A7%D8%B2%D9%86-%D8%A7%D8%B3%D9%84%D8%AD%D8%A9-%D9%88%D8%AA%D8%AC%D9%85%D8%B9%D8%A7%D8%AA-%D9%84%D9%84%D8%AD%D9%88%D8%AB%D9%8A%D9%8A%D9%86-%D9%81%D9%8A-%D9%85%D8%A7%D8%B1%D8%A8>
- [6] <https://t.me/army21ye/3779>
- [7] <https://x.com/Me1Ray/status/2103724261919822094?s=20>
- [8] <https://www.sabanew dot net/story/ar/152993>
- [9] <https://x.com/SaudiDCD/status/2103602900790645047?s=20> ;
<https://x.com/SaudiDCD/status/2103648896475939315?s=20>;
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- [10] <https://saba dot ye/ar/news3796225.htm?cid=1>
- [11] <https://saba dot ye/ar/news3796225.htm?cid=1>
- [12] <https://saba dot ye/ar/news3796225.htm?cid=1>
- [13] <https://www.nytimes.com/2026/09/24/world/middleeast/france-saudi-arabia-red-sea-yemen-houthis.html?smid=nytcore-ios-share> ; <https://www.bbc.com/news/articles/cqlykpe4dk0yo>
- [14] <https://x.com/modgovksa/status/2103565440903430446?s=20>
- [15] <https://www.reuters.com/world/asia-pacific/saudi-arabia-turkey-pakistan-sign-joint-defence-deal-amid-regional-turmoil-2026-08-07/>