

Iran Update, September 27, 2026



Carolyn Moorman, Ria Reddy, Adham Fattah, 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.

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

Key Takeaways

1. Saudi and Yemeni government-aligned forces targeted Houthi forces positioned east of Taiz City on September 27, likely to disrupt the Houthis' ability to sustain operations east of the city. Yemeni government-aligned forces also continue to engage Houthi forces in mountainous terrain overlooking the Bab al Mandeb.
2. The United Kingdom arrested five men near Royal Air Force (RAF) Fairford on suspicion of making preparations for a terrorist attack involving explosives. Sources familiar with the investigation told the *Telegraph* that Iranian agents likely played a direct role in the suspected plot, but local authorities have not yet released the detainees' identities.
3. Iran has continued its efforts to drive up global oil prices in order to compel the United States to accept Iranian demands, including recognized Iranian control over the Strait of Hormuz. The Islamic Revolutionary Guards Corps (IRGC) Navy claimed that Iran has targeted 19 vessels that have attempted to transit the strait since September 25, though Iranian media provided no evidence to substantiate these claims.



Toplines

Saudi and Yemeni government-aligned forces continue to strike Houthi targets along frontlines in southwestern Yemen. The Yemeni military announced on September 27 that it has conducted 756 "operations," including airstrikes, targeting Houthi reinforcements and military equipment across multiple fronts in Yemen since September 24.[1] The Yemeni military claimed that its operations killed four Iranian drone and missile experts in Taiz Governorate, which exemplifies the direct role that the Islamic Revolutionary Guard Corps (IRGC) is playing in support of Houthi operations in Yemen.[2]

Saudi and Yemeni government-aligned forces targeted Houthi forces positioned east of Taiz City on September 27, likely to disrupt the Houthis' ability to sustain operations east of the

city. The Yemeni government's military said on September 26 that it struck several Houthi targets in Taiz Governorate, including the Houthi Istiqbal camp in Mawiyah, east of Taiz.[3] A Marib-based anti-Houthi journalist also reported airstrikes on warehouses east of Taiz City that reportedly supplied food to Houthi forces based in the area.[4] The same account also claimed that a strike on a newly-established Houthi camp near al Hawban, southwest of Taiz City, killed Houthi official Nour al Din al Marani.[5] Marani held multiple positions and responsibilities before his reported death, including as Taiz Governorate's Deputy Governor for Defense and Security Affairs and the Houthis' Fourth Military Region Assistant Commander. Marani was reportedly responsible for Houthi drone operations in Taiz, Lahij, and Dhaleh governorates.[6] The Houthis reportedly moved reinforcements from Ibb Governorate toward al Hawban in mid-September 2026.[7] Houthi forces positioned in al Hawban and east of Taiz City could support future Houthi operations to seize Taiz City. The Houthis are currently threatening the primary ground line of communication (GLOC) that connects Taiz City to Aden City.[8] Houthi control over the Taiz-Aden GLOC would effectively encircle Yemeni government forces in Taiz City and set conditions for the Houthis to seize the city.

Yemeni government-aligned forces also continue to engage Houthi forces in mountainous terrain overlooking the Bab al Mandeb. The Southern Giants Brigades conducted a drone strike targeting Houthi forces and vehicles along the Jabal Kahbub front on September 27.[9] A Yemeni government-affiliated news aggregator cited unconfirmed reports on September 26 that fighting near Jabal Kahbub killed a Houthi naval commander.[10] Jabal Kahbub is approximately 30 kilometers north of Houthi positions by the Bab al Mandab Strait. Geolocated footage posted on September 26 separately shows Yemeni government-aligned forces and southern tribal fighters engaging Houthi forces near Jabal Numan.[11] Houthi forces have engaged Yemeni government forces near Jabal Numan since at least September 21 in an attempt to advance eastward into western Taiz Governorate.[12]



The United Kingdom arrested five men near Royal Air Force (RAF) Fairford on suspicion of making preparations for a terrorist attack involving explosives.[13] Sources familiar with the investigation told the *Telegraph* that Iranian agents likely played a direct role in the suspected plot, but local authorities have not yet released the detainees' identities.[14] RAF Fairford serves as a forward operating base for the US Air Force Global Strike Command.[15] The United Kingdom previously authorized the United States to use US bombers based at the Fairford base to strike Iranian missile sites that targeted ships in the Strait of Hormuz.[16] Iran has repeatedly threatened to attack bases that either support US operations against Iran or host US forces or equipment.[17] Local sources told CNN that authorities have increased security at the base in recent weeks.[18]

Iran has continued its efforts to drive up global oil prices in order to compel the United States to accept Iranian demands, including recognized Iranian control over the Strait of Hormuz. The IRGC Navy claimed on September 27 that Iran has targeted 19 vessels that have attempted to transit the strait since September 25, including seven vessels overnight on September 26 and 27.[19] Iranian media provided no evidence to substantiate these claims. The UK Maritime Trade Operations has not reported any attacks against vessels in the strait since September 23 but has reported continued Iranian intimidation of commercial shipping.[20] The Iranian claims, regardless of their veracity, likely seek to create an informational effect that increases shipping companies' risk perceptions of transiting the strait without Iranian permission. These claims come as US efforts to restore freedom of navigation continue to challenge Iran's ability to enforce control over the strait. US Treasury Secretary Scott Bessent stated on September 27 that between 15 and 22 million barrels of oil currently pass through the strait daily, compared to the 20 million barrels of oil that passed through the strait daily before the war.[21]

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

Nothing significant to report.



Endnotes

[1] https://x.com/Yem_army_media/status/2104252684890931209/photo/1

[2] https://x.com/Yem_army_media/status/2104252684890931209/photo/1 ;
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Iran Update, September 28, 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 and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

1. Saudi and Yemeni government-aligned forces may be targeting senior Houthi and Iranian Islamic Revolutionary Guards Corps (IRGC) missile and drone experts and military commanders in order to degrade the Houthis' ability to attack Saudi oil infrastructure, military bases, and vessels.
2. Saudi and Yemeni government-aligned forces are likely attacking Houthi sustainment and logistics centers in order to weaken Houthi forces that are engaged in combat across several sectors in Taiz Governorate.
3. Yemeni government-aligned forces have concurrently continued to engage Houthi fighters on elevated terrain overlooking the Bab al Mandeb Strait and the Red Sea coastal plain.
4. US President Donald Trump rejected an Iranian proposal that largely resembles the terms of the June US-Iran memorandum of understanding (MoU) and does not appear to include any new Iranian concessions.
5. Iranian efforts to threaten shipping in the Strait of Hormuz aim to compel the United States to accept Iranian demands and surrender.
6. The terms of the Iranian proposal indicate that Iran remains unwilling to make serious concessions even as Iran faces deteriorating economic conditions due to intensified US economic measures.
7. Iranian officials expressed concerns to anti-regime media that current Basij Organization Commander Hossein Taeb is attempting to establish an armed support base. These concerns point to broader dysfunction issues within the Iranian regime that are likely due in large part to the reduced presence or influence of the Supreme Leader, who has traditionally played a key role in managing competition among the regime's various factions.



Toplines

Saudi and Yemeni government-aligned forces may be targeting senior Houthi and Iranian Islamic Revolutionary Guards Corps (IRGC) missile and drone experts and military commanders in order to degrade the Houthis' ability to attack Saudi oil infrastructure,

military bases, and vessels. An independent Yemeni analyst reported on September 28 that unspecified forces conducted an “operation” targeting a senior Houthi missile force commander and two Houthi missile experts south of Sanaa City.[1] The analyst also claimed that the unspecified forces conducted a separate operation targeting an unspecified site in the al Sabeen area of Sanaa City, which has previously hosted Houthi command and control (C2) sites.[2] International media reported that a large explosion of unknown causes occurred in Sanaa City on September 28, roughly around the time of the reported operations.[3] It is unclear whether the explosion is connected to the reported operations, however. Saudi-led coalition forces have killed other Houthi and IRGC drone and missile experts and commanders in recent days, according to Yemeni and Saudi media.[4]

Saudi and Yemeni government-aligned forces may be attempting to disrupt the Houthis’ C2 networks and eliminate the group’s drone and missile expertise, which could, in theory, disrupt the Houthis’ ability to coordinate attacks on Saudi Arabia and vessels in the Red Sea. The United States previously targeted and killed Houthi drone and missile commanders in strikes on Sanaa and other major Houthi-controlled cities during Operation Rough Rider in 2025, which sought to degrade the Houthis’ ability to attack vessels in the Red Sea.[5] The Houthis’ drone and missile capabilities based in Sanaa are currently more important to the group’s strike campaign against Saudi oil infrastructure than its attacks on Yemeni government-aligned forces in Yemen.[6] The Houthis typically use armaments such as small arms, artillery, and first-person view (FPV) drones that are better suited for ground combat in southwestern Yemen’s rugged terrain rather than deploying missile or long-range drone assets.

A Saudi-Yemeni government strike campaign targeting Houthi missile and drone experts and commanders will only temporarily inhibit the group’s ability to coordinate attacks on Saudi territory, however. The Houthis presumably have been able to reconstitute some of their drone and missile capabilities following Operation Rough Rider in 2025, given that they have conducted numerous attacks on Saudi vessels, oil infrastructure, and military bases since July 2026.[7] Decapitation strikes typically offer only a temporary opportunity to exploit disruptions to the enemy’s C2 networks because most developed military organizations can replace killed commanders. The Houthis also control a de facto, albeit illegitimate, state in northern and western Yemen with extensive military and political command networks that can replace individual commanders.[8] Short-term C2 disruptions could, in theory, provide an opportunity for Saudi and Yemeni government-aligned forces to further degrade the Houthis’ capabilities and will to strike Saudi sites or continue their operations to expand Houthi territory in Yemen.

Saudi and Yemeni government-aligned forces are likely attacking Houthi sustainment and logistics centers in order to weaken Houthi forces that are engaged in combat across several sectors in Taiz Governorate. A Yemeni news aggregator reported on September 28 that Yemeni government-aligned forces conducted airstrikes targeting Houthi weapons depots in the vicinity of al Rubayi, which is adjacent to the main road linking Taiz City and the Houthi-controlled Red Sea port of Mokha.[9] Saudi and Yemeni government-aligned forces also previously conducted airstrikes targeting Houthi food storehouses on the main ground line of communication (GLOC) between Taiz City and the Houthi-controlled Yemeni capital of Sanaa on September 27.[10] Attacks on sustainment centers and weapons depots reflect a Saudi-Yemeni government effort to weaken Houthi combat forces throughout Taiz Governorate. The Houthis are currently attempting to capture territory and disrupt Yemeni government GLOCs throughout Taiz Governorate as they secure adequate supply lines. These GLOCs are essential in sustaining the Houthis campaign to capture Taiz City, consolidate control over the Mokha-Taiz GLOC, and cut off the Yemeni government’s last remaining GLOC between Taiz City and Aden.[11]

The Houthis also engaged Yemeni government-aligned forces in Jabal Habashi District, located immediately south of the Mokha-Taiz road, on September 27.[12] The Houthis may intend to advance east through Jabal Habashi District in order to disrupt or sever the Taiz-Aden GLOC and prevent Yemeni

government-aligned forces from sustaining forces in Taiz City and the immediate vicinity. This would constitute an effective Houthi encirclement of Taiz City, which would threaten Yemeni government control over a major population center and isolate a significant amount of Yemeni government-aligned forces and materiel.[13]

Yemeni government-aligned forces have concurrently continued to engage Houthi fighters on elevated terrain overlooking the Bab al Mandeb Strait and the Red Sea coastal plain. The Yemeni government-aligned Southern Giants Brigades repelled several attempted Houthi advances in the vicinity of Jabal Kahbub, which is a mountain range that overlooks the Red Sea coastal plain about 30 kilometers north of the Bab al Mandeb Strait.[14] The Southern Giants Brigades published several videos of their forces conducting anti-tank guided missile (ATGM) and bomb-drop drone attacks on Houthi vehicles and positions during these attempted advances on September 27 and 28.[15] A US-based Yemen analyst also reported on September 28 that the Houthis have engaged Yemeni government-aligned forces in particularly heavy combat in areas on the Taiz-Lahij Governorate border since September 25.[16] ISW-CTP has observed and reported on heavy combat between Houthi fighters and Yemeni government-aligned forces in these areas in recent weeks.[17] The Houthis likely seek to capture Jabal Kahbub and other elevated terrain in southwestern Taiz Governorate in order to deny Yemeni government-aligned forces favorable positions that could threaten Houthi control over the coastal plain.[18] A sustained Yemeni government force presence at Jabal Kahbub and on other elevated terrain in southwestern Yemen could permit Yemeni government-aligned forces to attack Houthi fighters and positions near the Bab al Mandeb.



US President Donald Trump rejected an Iranian proposal that largely resembles the terms of the June US-Iran memorandum of understanding (MoU) and does not appear to include any meaningful Iranian concessions. Iran reportedly sent a ceasefire proposal to US officials via Qatari mediators on September 16.[19] The Iranian proposal called for a complete ceasefire and for the United States to lift the US blockade on Iranian ports, unfreeze billions of dollars of frozen Iranian assets, and end US sanctions on Iranian oil.[20] Iran would “re-open” the Strait of Hormuz to some commercial traffic after seven days and Iran and the United States would resume nuclear negotiations, according to Iranian Foreign Affairs Minister Abbas Araghchi.[21] This proposal, as rendered by Western media, does not include any new meaningful Iranian concessions. The proposal bears strong resemblance to the MoU that the United States and Iran signed in June 2026.[22] Iran committed to open the Strait of Hormuz to toll-free passage for 60 days in exchange for the United States lifting the US naval blockade under this agreement. The United States and Iran committed to negotiate a final deal within 60 days that would address the release of frozen Iranian funds, elimination of US sanctions on Iran, and a nuclear agreement.[23] The Iranian offer to “open” the strait after seven days does not necessarily mean that Iran would relinquish control over the strait, given that Iran has not indicated that it would relinquish its broader claims over the strait or abandon its effort to regulate maritime traffic. The requirement under the June 2026 MoU that Iran re-open the strait effectively advanced Iranian objectives by allowing Iran to briefly “re-open” the strait in a way that retained Iranian management over the strait through the Persian Gulf Strait Authority (PGSA). The PGSA is an organization that Iran established to formalize its control over the strait and force commercial vessels to pay tolls and coordinate their movements with Iran.[24] Two regional officials separately told the Associated Press on September 28 that Iran’s proposal would reopen the strait under a temporary shipping management arrangement that Iran is discussing with Oman.[25]

President Trump publicly stated on September 26 that he rejected Iran’s proposal. Araghchi noted a day later that US-Iran mediators had not yet formally conveyed the United States’ rejection and that Iran was

waiting for a clear US position before determining its next steps.[26] An unspecified official briefed on the negotiations told Reuters on September 28 that Qatari mediators expected to hold separate talks with Araghchi and US representatives on September 28 or 29 over an amended version of Iran's proposal.[27] The source did not provide any details on how the amended proposal differs from the original version, however.[28]

The terms of the Iranian proposal indicate that Iran remains unwilling to make serious concessions even as Iran faces deteriorating economic conditions due to intensified US economic measures. Increasingly restrictive US economic measures and the US naval blockade are restricting Iran's access to oil revenue, hard currency, and external financial networks.[29] New aviation restrictions have further isolated Iran by cutting Iranian airlines off from several neighboring countries.[30] Unspecified Iranian experts told the *New York Times* on September 27 that growing economic despair has alarmed regime leaders, who remain concerned about renewed nationwide unrest.[31] US measures and pressure so far have not pushed Iranian decision-makers to make major concessions, however. Regional government officials in contact with Iranian officials told the *Wall Street Journal* on September 27 that Iranian leaders believe Iran can withstand a prolonged blockade.[32] The *Wall Street Journal* referenced the IRGC's oversized presence in regime decision-making, which is consistent with ISW-CTP's assessment that IRGC Commander Major General Ahmad Vahidi dominates regime decision-making.[33] Hardliners, including Vahidi and his allies, appear willing to absorb greater economic costs than pro-concession officials in order to achieve key Iranian war aims, such as preserving Iran's claims over the strait.[34]

Iranian efforts to threaten shipping and attack US forces in the Strait of Hormuz are part of a regional campaign that aims to coerce the United States to surrender to Iranian demands. The IRGC claimed that it conducted 19 attacks on vessels on September 26 and 27.[35] Iranian media provided no evidence to substantiate these claims, and ISW-CTP has not observed evidence that these attacks occurred. The Iranian claims, regardless of their veracity, likely seek to create an informational effect that increases shipping companies' risk perceptions of transiting the strait without Iranian permission. The PGSA similarly warned vessel owners and charterers on September 26 against using routes that Iran considers unauthorized and threatened to impose future passage restrictions on companies that violate Iranian procedures.[36] These Iranian intimidation efforts come as the rate of traffic through non-Iranian-controlled routes in the strait has increased, likely due in large part to US efforts to restore the freedom of navigation in the strait.[37] Iranian informational efforts to intimidate shipping companies and keep oil prices high may reflect Iranian operational constraints on its ability to attack vessels in the strait, as ISW-CTP recently assessed.[38]

Iran has also attacked US naval forces as a line of effort within this campaign, likely to degrade the United States' willingness and ability to continue enforcing the US naval blockade on Iranian ports.[39] Three US officials told NBC News that an Iranian anti-ship cruise missile struck a vessel in the Strait of Hormuz on September 14 and injured eight US Marines.[40] Iran likely calculates that raising the military and political costs of enforcing the blockade will weaken US willingness to sustain blockade enforcement and ultimately pressure the United States to end the blockade.



Iranian officials expressed concerns to anti-regime media that current Basij Organization Commander Hossein Taeb is attempting to establish an armed support base that could be used to target political opponents. An Iranian government official with close ties to the IRGC told anti-regime outlet Iran Wire on September 24 that Taeb's revival and expansion of the Basij's Janfada Campaign has generated dissatisfaction among senior Iranian government officials, clerics, and even

IRGC commanders.[41] The Janfada (“Those Who Sacrifice Their Lives”) Campaign is a Basij recruitment and mobilization initiative designed to bolster domestic support for the regime during wartime. [42] The regime reportedly launched the campaign in 2025 during the 12-Day War and revamped it in late March 2026 in an effort to recruit members of the Iranian population to help the regime defend against foreign attacks and maintain internal security.[43] Taeb revived and expanded the campaign in September 2026.[44] The campaign mobilized volunteers to hold a rally in Tehran on September 18 that state media claimed involved hundreds of thousands of participants.[45] ISW-CTP previously assessed that the recent Janfada exercise likely intended to demonstrate to the domestic population the regime’s capacity for mass mobilization within Iran and deter social unrest.[46]

The Iranian government official claimed that Taeb added weapons training as a component of the Janfada Campaign in a concerted effort to exert influence over other branches of the regime.[47] The regime opened a military training center in Imam Hossein Square in Tehran on September 23 that will train Janfada volunteers to use weapons and defensive equipment under Basij supervision.[48] The government official cited concerns that Taeb could use trained participants as a part of an effort to bolster his own personal power within the regime, likely referring to a theoretical scenario in which Taeb is able to use supporters to threaten or pursue political rivals.[49] Concerns about Taeb attempting to exert influence over other components of the regime are consistent with Iranian officials’ recent suggestions to the *New York Times* that Taeb may have bypassed the authority of IRGC Commander Major General Ahmad Vahidi during a decision to attack civilian vessels in July 2026.[50]

A former IRGC member told Iran Wire on September 28 that Taeb aims to prevent the selection of a new supreme leader and preserve Mojtaba’s position through the Janfada Campaign.[51] Taeb has close ties to Mojtaba and was part of Mojtaba’s inner circle that reportedly pushed his election to the position of supreme leader in March 2026.[52] Taeb reportedly claimed that Mojtaba approved his plans for the Janfada Campaign.[53] Iran Wire reported on September 24 that Iranian regime officials from various factions are dissatisfied with Mojtaba as supreme leader.[54] The former IRGC member claimed that some factions are considering reelecting a new supreme leader following the cessation of hostilities with the United States.[55] The former IRGC member argued that certain IRGC- and Basij-linked actors are using the current leadership situation — likely referring to Mojtaba’s absence — to advance their own interests.[56]

Iranian officials’ concerns, as reported by Iran Wire, point to broader dysfunction within the Iranian regime that is likely due in part to the reduced presence or influence of the Supreme Leader, who has traditionally played a key role in managing competition among the regime’s various factions.[57] Two unspecified “regime insiders” told Iran Wire on September 28 that officials and IRGC commanders believe the current arrangement under Mojtaba Khamenei is “unsustainable” and is “actively weaken[ing] the system.”[58] Mojtaba has not made a public appearance since the start of the war on February 28, when he was severely injured in an Israeli airstrike that killed his father Ali Khamenei.[59] The former IRGC member said that Mojtaba’s orders reach Iranian officials through intermediaries, which creates uncertainty and reduces trust among Iranian officials.[60] A source connected to clerical circles in Qom said that many senior officials, including members of the Assembly of Experts — a body in charge of electing the supreme leader — are waiting for conditions to stabilize so that a new supreme leader can be selected.[61] Iranian anti-regime media and Western media have reported that some Assembly of Experts members opposed Mojtaba’s election in March 2026 and that those within Mojtaba’s inner circle, including Taeb, pressured members to vote for Mojtaba.[62]

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.

Iranian Domestic Affairs

See topline.

Lebanon

Israeli media reported on September 27 that the Israel Defense Forces (IDF) is reorganizing and fortifying its ground force presence in southern Lebanon.[63] Israeli media reported that the IDF is consolidating its forces along the IDF's so-called "Yellow Line" — referring to the line that demarcates the IDF's security zone in southern Lebanon — and has begun to construct "an extensive line of outposts" in southern Lebanon.[64] Reports of IDF efforts to reorganize its ground forces in southern Lebanon coincide with IDF ground force reductions in Lebanon. The IDF announced on September 24 that it reduced its ground force presence in Lebanon from eight to six brigades after achieving certain operational successes against Hezbollah in southern Lebanon.[65]

Iraq

Iraqi Prime Minister Ali al Zaydi is likely attempting to balance between competing US and Iranian demands on Iraq by negotiating with the United States to exempt some flights between Iran and Iraq from the Iraqi government's recent compliance with the US ban on Iranian flights. The Iraqi federal government and the United States have negotiated in recent days over granting a sanctions waiver for Iraqi Airways flights that carry Shia pilgrims between Iran and Najaf International Airport.[66] Flights between Najaf International Airport and Iran resumed on September 28, which suggests that the United States and Iraq may have reached an agreement.[67] Zaydi offered to provide safeguards, including "rigorous screening," to ensure that the Iranian regime does not use the

flights to transfer weapons, illicit funds, or sanctioned individuals, according to an Iraqi official speaking to Western media on September 28.[68] Zaydi may view a limited waiver permitting religious flights as a way to compromise between competing US and Iranian pressure. The Iraqi federal government closed Baghdad and Najaf International Airports to Iranian planes on September 23 and 25, respectively, to avoid US sanctions on Iraqi airports and aviation companies.[69] Zaydi may have discussed the Iraqi government's decision to close Baghdad Airport to Iranian flights with Iranian President Masoud Pezeshkian in a September 23 meeting at the UN.[70] ISW-CTP assessed on September 24 that the Iranian regime is likely concerned about the Iraqi federal government's cooperation with US efforts to target Iran's sanctions evasion networks.[71]

Zaydi may have also attempted to secure exemptions for some Iranian flights in response to Iranian-backed Iraqi actors' backlash to the decision to close Iraqi airports to Iranian flights. The announcement that the Iraqi government was negotiating with the United States to obtain exemptions came after several Iranian-backed Iraqi political actors, including Asaib Ahl al Haq-affiliated First Deputy Parliament Speaker Adnan Faihan, issued separate statements on September 26 that condemned and called for a reversal of the Iranian flight ban.[72] The Iranian-backed Badr Organization also reportedly led a protest in Baghdad to demand that the Iraqi government reverse its decision, according to Iraqi media on September 28.^[73] Iranian-backed Iraqi militia Harakat Hezbollah al Nujaba supporters similarly demonstrated in front of Najaf International Airport on September 28.[74] Zaydi may also calculate that a waiver that allows some flights between Iran and Najaf International Airport may partially satisfy the militia's demands and limit militia escalation over this issue.

Arabian Peninsula

See topline.



Endnotes

- [1] <https://x.com/FaresALhemyari/status/2104520063449473140> ;
<https://x.com/IbrahimJalalYE/status/2104543719320129667?s=20>
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Iran Update, September 29, 2026



Benjamin Schmida, Carolyn Moorman, Katherine Wells, William Doran, Ben Rezaei, Parker Hempel, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

1. Houthi and Yemeni government-aligned forces have reportedly ordered general mobilizations to reinforce frontlines across Yemen, which may signal long-term Houthi intent to continue advances in Taiz Governorate and along the Red Sea coast and likely signals Yemeni government intent to reverse Houthi advances.
2. Kataib Hezbollah Security Chief Abu Mujahid Aasaf threatened in a September 28 statement to overthrow the Iraqi federal government “by all means” if it works against Iranian and Iranian-backed Iraqi militia interests in Iraq.
3. Aasaf threatened that the militias would close “the ports” of all countries participating in the “blockade” on Iranian flights and shoot down any hostile aircraft in Iraqi airspace. Aasaf’s reference to the federal government’s decision to close Iraqi airports to Iranian planes preceded the United States issuing a 30-day sanctions waiver for Iraqi Airways flights to carry Shia pilgrims between Iran and Najaf.



Toplines

Houthi and Yemeni government-aligned forces have reportedly ordered general mobilizations to reinforce frontlines across Yemen, which may signal long-term Houthi intent to continue advances in Taiz Governorate and along the Red Sea coast and likely signals Yemeni government intent to reverse Houthi advances. Yemeni government-aligned forces and the Houthis issued separate general mobilization orders on September 25 and 28, respectively.[1] An anti-Houthi journalist in Marib Governorate reported that the Houthis issued a general mobilization order to Yemenis in Houthi-controlled territory that includes enrollment in military training.[2] Houthi and other Yemeni sources have not corroborated this claim at the time of this writing, however. The reported Houthi general mobilization order came after Yemeni President Rashad al Alimi issued general mobilization orders on September 25, urging Yemeni government-aligned Yemenis to join the armed forces in a

national campaign to defeat the Houthis, restore state institutions, and extend government control across Yemen, including Sanaa City.[3] The government-aligned Union of Southern Arabian Tribes announced the formation of eight Aden-based battalions to reinforce Yemeni government-aligned frontlines in southern Yemen on September 29.[4] It is unclear if this tribal mobilization is a response to the government's general mobilization, however. The government's mobilization marks the first nationwide mobilization ordered by the Yemeni government, but a researcher at a Yemeni think tank told UK-based Saudi media on September 29 that "nothing in practice is happening" in response to the mobilization order thus far.[5] Both Houthi and Yemeni government general mobilizations are unlikely to result in an immediate or imminent deployment of frontline forces given that these forces must first receive at least some training.

The Yemeni government-aligned general mobilization order likely intends to increase the size of forces aligned with the government to reverse recent Houthi advances and the group's consolidation of positions along the Taiz and Red Sea coastal plain axes. The government also seeks to prevent further Houthi advances, which could potentially threaten Aden City, the Republic of Yemen's de facto capital. The Houthi general mobilization order, in contrast, may signal Houthi intent to continue advances along the same axes in order to threaten Aden and put further pressure on the Yemeni and Saudi governments to submit to Houthi demands. The Houthis may have also issued the order to bolster their forces to defend against Yemeni government operations that seek to retake territory that the Houthis have seized in recent weeks.

Both general mobilization efforts are likely also in response to heavy Houthi and Yemeni government-aligned casualties due to ongoing fighting along the Taiz and Red Sea coastal plain axes since the beginning of September.[6] An anti-Houthi journalist in Marib reported on September 28 that Houthi forces have killed at least 256 government-aligned fighters in southern Yemen over the past three weeks and another 40 in Marib Governorate on September 28 alone.[7] A London-based Yemen analyst, citing Yemeni government figures, separately claimed to Saudi media on September 22 that Yemeni government-aligned forces have killed approximately 2,000 Houthi fighters since the Houthi offensive began on September 9.[8] This claim has not been independently verified, however.



Kataib Hezbollah Security Chief Abu Mujahid Aasaf threatened in a September 28 statement to overthrow the Iraqi federal government "by all means" if it works against Iranian and Iranian-backed Iraqi militia interests in Iraq.[9] Aasaf warned Prime Minister Ali al Zaydi that Kataib Hezbollah would overthrow "any government that does not work for the benefit of the people." [10] Aasaf likely made this threat in response to Zaydi's efforts to disarm the militias and reduce Iranian influence in Iraq. Aasaf has recently condemned multiple government decisions, including the government's decision to close the Baghdad and Najaf airports to Iranian planes, that constrain Iran's ability to operate in Iraq and interfere in Iraqi affairs.[11] Iranian-backed Iraqi actors, especially the militias, have repeatedly expressed outrage over the government's compliance with US sanctions on Iranian airlines.[12] Aasaf's message came ahead of the United States' military withdrawal from Iraq on September 30. Aasaf celebrated the withdrawal and implicitly threatened that the militias would resume attacks if US forces returned to Iraq.[13]

Aasaf also threatened countries that continue to comply with US sanctions on Iranian airlines after October 1.[14] Aasaf said that the militias would close "the ports" of all countries participating in the "blockade" on Iranian flights and shoot down any hostile aircraft in Iraqi airspace, the latter of which may refer to any flights over Iraq by countries complying with US sanctions on Iranian airlines.[15] Iran recently banned UAE-based airlines from flying in its airspace after the UAE banned Iranian flights.[16]

Aasaf's reference to the federal government's decision to close Iraqi airports to Iranian planes preceded the United States issuing a 30-day sanctions waiver for Iraqi Airways flights to carry Shia pilgrims between Iran and Najaf International Airport.[17] The United States and the Iraqi federal government negotiated the waiver in recent days.[18] Najaf houses the Imam Ali Shrine, which is the burial place of the first Shia Imam.[19] Shias travel to Najaf annually for the Arbaeen pilgrimage.[20] The waiver includes strict operational guidelines, according to Iraqi and Western media.[21] ISW-CTP assessed on September 28 that Zaydi may view the limited waiver as a compromise between competing US and Iranian pressure.[22]

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*

Iran could decide to expand attacks against regional infrastructure or shipping to try to alter the current situation in the war, in which non-Iranian oil exports through the Strait of Hormuz are increasing, and Iran is increasingly unable to sell oil. The *Wall Street Journal* reported on September 28 that Middle Eastern oil exports reached nearly 13 million barrels per day in September, which is more than half of pre-war levels.[23] The recent increase in oil exports is part of a larger trend of growing oil tanker and other commercial vessel traffic through the strait since late August despite Iranian efforts to restrict traffic.[24] The *Wall Street Journal* also reported that Iranian crude oil loaded aboard vessels located outside the US blockade line has fallen from 29 million barrels in early September to approximately 15 million barrels and could run out by mid-October.[25] This report comes after US Treasury Secretary Scott Bessent stated on September 27 that Iran would deliver its remaining oil shipments to the People's Republic of China (PRC) within two weeks, after which Iran would have "nothing left to trade for anything." [26] These reports highlight how Iran is facing a widening imbalance between increasing non-Iranian oil exports through the Strait of Hormuz and declining Iranian oil supplies outside the blockade line. Iranian Parliament Speaker Mohammad Bagher Ghalibaf warned on September 29 that "no one will sell oil" if Iran cannot sell its own and that "no infrastructure will be safe" if Iran's "security" is not ensured.[27] Ghalibaf's remarks indicate that Iran may consider attacking regional energy infrastructure or shipping as its existing pressure on traffic through the strait produces diminishing returns. Iran has continued to attack shipping in the strait but at lower rates than it did earlier in the conflict. A likely Iranian projectile struck a vessel transiting the Strait of Hormuz on September 28 and caused a fire, for example.[28]

US-Iran Negotiations

Iran's deteriorating economic conditions appear to have driven officials from Iran's pro-concessions camp to renew negotiations with the United States. Iranian, regional, and US

sources assessed that Iran's recent meetings with mediators were in part due to Iran's ongoing economic degradation, according to Reuters on September 29.[29] The US blockade on Iranian ports, ban on Iranian airlines, and increasing sanctions on Iran's revenue networks have caused a foreign currency shortage that has increased inflation and led to the rial reaching an all-time low on September 29 (see graph below).[30] The blockade on Iranian ports and ban on Iranian airlines are also pushing Iran to increasingly rely on overland trade, which has caused long lines and delays near border crossings.[31] Western media recently highlighted how some Iranian transportation workers have criticized the long border transit times and poor pay.[32] Some government officials and members of the pro-concessions camp continue to acknowledge Iran's worsening economic situation.[33] The Iranian government recently admitted that it is unable to increase salaries to compensate for increasing prices due to a lack of available resources, for example.[34] These economic concerns appear to have driven Iranian negotiators, who are part of the pro-concessions camp, to engage in new talks with the United States.[35] This camp has repeatedly advocated for reaching a deal with the United States to secure economic relief and thereby ensure domestic stability.[36] Recent rhetoric from hardline Iranian officials and media, alongside continued Iranian attacks on shipping in the Strait of Hormuz, reinforces ISW-CTP's assessment that the hardline IRGC faction controlling regime decision-making has not softened its position over key issues despite these economic conditions, however.[37]



Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

Saudi leaders likely discussed the Houthi-Saudi conflict and prospects for international military support with US and Emirati officials on September 28 and 29.[38] Saudi Foreign Minister Faisal bin Farhan al Saud met with US Secretary of State Marco Rubio in Washington, DC, on September 28 before attending separate meetings with US Senate Intelligence and Armed Services Committee leaders on September 29.[39] Saudi state media reported that Faisal and Rubio discussed strategic US-Saudi relations, protection for civilian maritime traffic, and safe passage through the Bab al Mandeb Strait and Strait of Hormuz.[40] US government reports on the meeting differed from the Saudi official report, providing little detail on discussions concerning Yemen.[41] Faisal and Rubio almost certainly discussed military developments in Yemen and the Houthi-Saudi conflict despite the differences in US and Saudi reports on the meeting's contents, given that the Yemen conflict is currently Saudi Arabia's primary security concern. Emirati state media separately reported on September 29 that Emirati Vice President and Deputy Prime Minister Mansour bin Zayed al Nahyan and a delegation of senior

Emirati security officials met with Saudi Crown Prince Mohammed bin Salman in Riyadh to discuss regional developments.[42] Saudi officials have spoken with various international leaders in recent weeks to seek military support against the Houthis amid the group's offensive against the Saudi-backed Yemeni government and strike campaign against Saudi oil infrastructure.[43] Several Saudi partners, including the United States, the United Kingdom, and France, are providing chiefly defensive military support to Saudi Arabia, which poses a challenge to the Houthi strike campaign against Saudi Arabia.[44]

Emirati and Saudi leaders likely discussed potential security cooperation to confront the Houthis' threat to international maritime traffic, despite previous conflicts between Saudi-backed and Emirati-backed Yemeni forces in Yemen in late 2025 and early 2026.[45] The Houthis have increasingly attempted to assert formal authority and control over vessel passage through the Bab al Mandeb since Houthi forces captured the Red Sea coastal plain and islands in the southern Red Sea from Yemeni government-aligned forces between September 9 and 11.[46] Iranian attempts to control the Strait of Hormuz and attacks on civilian vessels in the strait have imposed economic and political costs on the United Arab Emirates and other oil-exporting Gulf states, which Houthi control over the Bab al Mandeb would compound.[47]

Iranian and Axis of Resistance advisers provided the Houthis with signals intelligence (SIGINT) and tactical planning before and during the Houthis' Red Sea coastal plain offensive between September 9 and 11, according to international media.[48] Unspecified regional officials, a Houthi official, and an independent security analyst told the Associated Press on September 23 that Iranian Islamic Revolutionary Guards Corps (IRGC) advisers in Yemen assisted the Houthis with tactical planning, satellite imagery, and SIGINT before and during the coastal plain offensive.[49] A Yemeni journalist also reported on September 21 that Houthi, Hezbollah, and Iranian-backed Iraqi militia personnel developed and deployed vehicles carrying communications equipment to intercept radio transmissions from Yemeni government-aligned forces in Mokha and western Taiz Governorate during the offensive.[50] IRGC and other Axis of Resistance forces have also cooperated and coordinated with the Houthis to conduct attacks on Saudi Arabia during the ongoing regional conflict.[51] Regional officials told the Associated Press on September 9 that the Houthis helped Iraqi militias plan and conduct drone attacks on Saudi oil facilities in July 2026, for example.[52]



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Iran Update, September 30, 2026



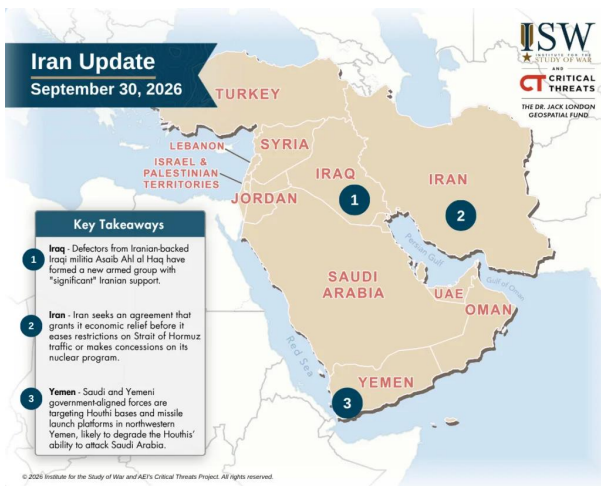
Carolyn Moorman, Ben Rezaei, William Doran, Benjamin Schmida, Bailey Pasternak, Kelly Campa

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 and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

1. Defectors from Iranian-backed Iraqi militia Asaib Ahl al Haq have formed a new armed group with “significant” Iranian support, according to the Washington Post on September 30. This report illustrates the obstacles that the Iraqi federal government will face in verifying the disarmament of Iranian-backed Iraqi militias.
2. This breakaway militia may be operating under direct Islamic Revolutionary Guards Corps (IRGC) control.
3. Several other Iranian-backed Iraqi militias have continued to refuse to disarm even as US-led international coalition forces withdrew from Iraq on September 30.
4. Kataib Hezbollah also urged all Iraqi militias on September 30 to halt all military operations, with the exception of operations targeting “hostile aircraft” until the Iraqi federal government secures air defense systems.
5. Iran is attempting to secure an agreement with the United States in which Iran would obtain some economic relief before easing restrictions in the Strait of Hormuz or making any nuclear concessions.
6. Saudi and Yemeni government-aligned forces are targeting Houthi military bases and missile launch platforms in Houthi-controlled areas of far northwestern Yemen, likely in an effort to degrade the Houthis’ ability to attack Saudi Arabia.



Toplines

Defectors from Iranian-backed Iraqi militia Asaib Ahl al Haq have formed a new armed group with “significant” Iranian support, according to the *Washington Post* on September 30.[1] This report illustrates some of the obstacles that the Iraqi federal government faces as it attempts to disarm Iranian-backed Iraqi militias. An Iraqi official told the *Washington Post* that Asaib Ahl al Haq transferred only half of its weapons arsenal to the Iraqi state and that a group of defectors used the remainder to form a new militia.[2] Asaib Ahl al Haq announced its intent to disarm on June 2 in a move that likely reflected Asaib Ahl al Haq head Qais al Khazali’s ongoing political and economic aspirations.[3] The decision of some Asaib Ahl al Haq members to form a new militia rather than disarm is consistent with the disarmament-related internal fissures that ISW-CTP has previously identified within the group.[4] The Iraqi official’s statement to the *Washington Post* on September 30 also confirms that the weapons that Asaib Ahl al Haq handed over to the federal government in August 2026 only constituted a fraction of the militia’s arsenal.[5] Asaib Ahl al Haq reportedly handed over some weapons to the disarmament committee and unspecified brigades of the Iranian-backed Popular Mobilization Forces, under which Asaib Ahl al Haq controls three brigades.[6] Asaib Ahl al Haq controls several headquarters and bases across Iraq at which the militias store weapons, including missiles and drones.[7]

This breakaway militia may be operating under direct Islamic Revolutionary Guards Corps (IRGC) command. There are several indicators that suggest that the Asaib Ahl al Haq splinter militia is currently responding to IRGC commands. The new militia has coordinated operations with the Houthis and participated in recent attacks on Saudi Arabia’s energy sector, according to the *Washington Post*. [8] Iraqi militias and the Houthis have increased cooperation in recent months, including through Houthi attacks targeting Saudi Arabia from Iraqi territory.[9] Saudi Arabia and unspecified regional partners have assessed that the IRGC coordinated the recent Iraqi and Houthi attacks on Saudi Arabia in late July 2026.[10] The Asaib Ahl al Haq splinter militia may also be among the “newly-formed,” IRGC-directed Iraqi militia cells that Iraqi militia commanders claimed are currently receiving preferential support from Iran.[11] These “newly-formed” militias are reportedly conducting attacks on Saudi Arabia, which is consistent with the *Washington Post*’s reporting about the Asaib Ahl al Haq splinter group’s recent attacks. It is possible that the defectors are unwilling to consistently respond to IRGC commands, however. Asaib Ahl al Haq formed as a splinter from Muqtada al Sadr’s Mahdi Army and has occasionally displayed a willingness to disregard Iranian directives, such as when the militia attempted to assassinate the Iraqi prime minister in 2021.[12]

Several other Iranian-backed Iraqi militias have continued to refuse to disarm even as US-led

international coalition forces withdrew from Iraq on September 30.[13] The US Defense Department and Iraqi officials said the United States and Iraq will now prioritize bilateral security and intelligence cooperation following the withdrawal of coalition forces.[14] Iranian-backed Iraqi militias have long used the US presence in Iraq to justify their armament and will likely cite other pretexts now that US forces have withdrawn. The Islamic Resistance in Iraq, which is an Iraqi militia coalition that includes the militias most active kinetically and historically closest to Iran, reiterated on September 30 its refusal to disarm.[15] Kataib Hezbollah, which is a member of the Islamic Resistance in Iraq, separately claimed the militia has proof that the United States is still operating in Iraqi airspace.[16] Kataib Hezbollah threatened on September 28 to shoot down “hostile aircraft” operating in Iraqi airspace.[17] A Harakat Hezbollah al Nujaba front group also stated on September 29 its refusal to disarm without permission from a religious authority and threatened to attack any “foreign presence” in Iraq or any country that is aggressive toward Iran.[18] Many of the Iraqi militias, including Harakat Hezbollah al Nujaba, ultimately answer to Iran’s Supreme Leader. Iran has repeatedly expressed its opposition to the Iraqi militias disarming.[19]

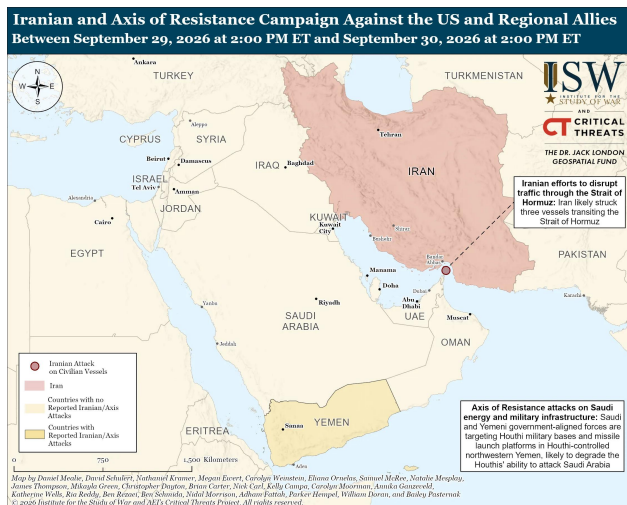
September 30 also marks the original date that Iraqi Prime Minister Ali al Zaydi previously declared to be the deadline for the federal government to disarm the militias.[20] Zaydi announced that the new deadline for militia disarmament is June 2027, almost certainly due to a lack of government progress.[21]

Kataib Hezbollah also urged all Iraqi militias on September 30 to halt all military operations, with the exception of operations targeting “hostile aircraft” until the Iraqi federal government secures air defense systems.[22] Iraqi militias have historically used the phrase “hostile aircraft” to refer to US and Israeli aircraft, but Kataib Hezbollah recently used this term to refer to countries adhering to US sanctions on Iran’s aviation industry.[23] The Iraqi militias, and their representatives in parliament, have urged the Iraqi federal government to secure air defense systems capable of blocking use of Iraqi airspace to attack Iran.[24] Iraq is currently finalizing financing mechanisms to purchase a South Korean air defense system.[25]

Iran is attempting to secure an agreement with the United States in which Iran would obtain some economic relief before easing restrictions in the Strait of Hormuz or making any nuclear concessions.[26] The Iranian government confirmed on September 30 that Foreign Affairs Minister Abbas Araghchi received the US response to a recent Iranian ceasefire proposal passed through Qatari mediators.[27] Iran had sent the United States a “seven-day” proposal on September 16, under which Iran would reopen the strait on the sixth day and resume nuclear negotiations on the seventh day if the United States accepted the plan.[28] US President Donald Trump publicly rejected the proposal on September 26.[29] Axios reported on September 29, citing three sources familiar with the talks, that Qatari mediators discussed a two-page compromise proposal with Araghchi that addressed Iran’s demand to lift the US naval blockade and the US demand for Iranian nuclear concessions.[30] A non-Iranian official briefed on the talks told Reuters on September 30 that the circulated seven-day “trust-building” plan sought to return both sides to an “enhanced” June US-Iran memorandum of understanding (MoU) and included unspecified “concrete steps” on Iran’s nuclear program.[31] It remains unclear which proposal the official described or how the “enhanced” framework and its nuclear provisions differ from the June MoU.

The non-Iranian official added that the primary disagreement concerns the sequencing of the plan’s steps rather than its components.[32] Iran’s proposed sequencing echoes its approach during negotiations in May and June 2026, in which Iran sought sanctions relief, frozen assets, an end to the naval blockade, and recognition of its role in managing the strait before substantive nuclear talks could take place.[33] Iran’s current proposal would “reopen” the strait on the sixth day of implementation if the United States

accepted the plan, unlike the immediate “reopening” of the strait under the June MoU.[34] Securing economic relief from the United States as a first step before reopening the strait reduces US leverage in subsequent negotiations over the strait and nuclear issues.



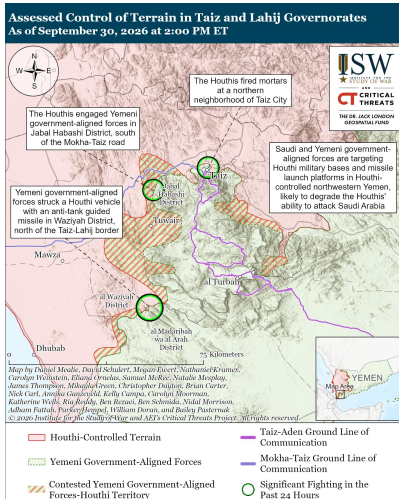
Saudi forces are targeting Houthi military bases and missile launch platforms in Houthi-controlled areas of far northwestern Yemen, likely in an effort to degrade the Houthis' ability to attack Saudi Arabia. Likely Saudi airstrikes targeted Houthi missile launch platforms and military bases in northwestern Yemen's Amran Governorate on September 30, according to Houthi media and anti-Houthi Yemeni reports.[35] An anti-Houthi, Marib-based journalist reported on September 29 that unspecified forces conducted airstrikes on Houthi weapons depots in Saada and Amran Governorates.[36] Saudi Arabia likely struck these targets to degrade the Houthis' ability to attack Saudi oil infrastructure and military bases, which the group has frequently targeted since July 2026.[37] Saudi Arabia likely seeks to prevent Houthi missile and drone attacks on critical oil infrastructure, including the East-West Pipeline, which resumed operations on September 22 after attack damage that halted the pipeline's operations on September 11.[38] Houthi missile sites in Saada and Amran governorates lie near the Saudi border and far from active frontlines, which suggests that the Houthis use these positions to attack Saudi Arabia rather than government forces to the south. Saudi Arabia previously identified and targeted missile launch sites and Houthi military infrastructure in Saada and Amran governorates in order to prevent Houthi attacks on Saudi Arabia in 2018 and 2021, for example.[39] Saudi airstrikes also targeted communications infrastructure in Amran Governorate on September 30, although it is unclear whether these strikes were part of Saudi Arabia's effort to disrupt Houthi attacks on Saudi Arabia.[40]

ISW-CTP assesses that Saudi and Yemeni government-aligned forces are pursuing three main operational objectives through their air campaign against the Houthis:

- **Degrade Houthi command-and-control (C2) and military capabilities central to the group's strike campaign against Saudi assets:** Saudi and Yemeni government-aligned forces seek to degrade the Houthis' ability to attack Saudi oil infrastructure, military bases, and vessels by decapitating Houthi missile and drone force leadership.[41] Saudi strikes on Houthi missile sites and bases in northwestern Yemen likely complement this campaign. C2 disruptions only provide temporary opportunities for anti-Houthi forces to exploit.[42]
- **Disrupt Houthi sustainment and logistics efforts to weaken forces that are engaged in combat across several sectors:** Saudi and Yemeni government-aligned forces have targeted Houthi food storehouses and weapons depots on major ground lines of communication (GLOC) near Taiz City in recent days.[43] These GLOCs and supply centers are essential in sustaining Houthi combat operations to isolate and capture Taiz City, secure long-term Houthi control over the Red

Sea coastal plain, and cut off Yemeni government GLOCs.[44]

- **Halt Houthi ground advances in Yemen with close air support to Yemeni government-aligned forces:** Saudi and Yemeni government-aligned forces frequently conduct airstrikes and drone attacks targeting Houthi fighters and positions on front lines in southern and eastern Yemen.[45] These air operations support ground forces that are engaged in constant combat with Houthi fighters and face significant logistical strains from Houthi advances and attacks.



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

See topline section.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

See topline section.

POWERED BY:  BABEL STREET

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Iran Update, October 1, 2026



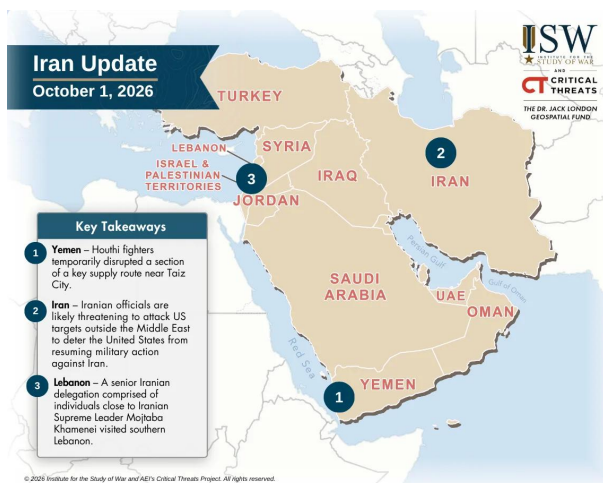
Benjamin Schmida, Adham Fattah, Bailey Pasternak, Nidal Morrison, Katherine Wells, Annika Ganzeveld

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

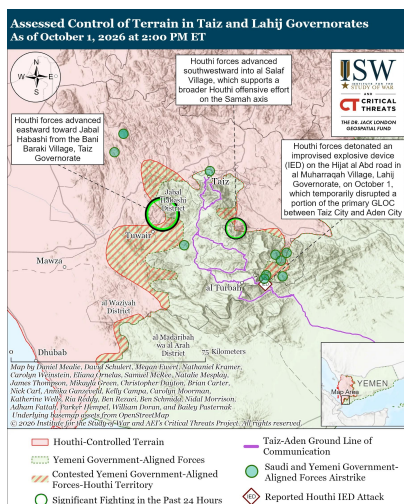
1. Houthi forces temporarily disrupted a section of the Yemeni government-aligned forces' primary ground line of communication (GLOC) between Taiz City and Aden City on October 1 as part of their effort to isolate Yemeni government-aligned forces in Taiz City.
2. The Houthi attack demonstrates the group's ability to render the wider GLOC inoperable, which could impose multiple dilemmas on Yemeni government-aligned forces. Houthi forces simultaneously continue to advance in northeastern and northwestern Taiz Governorate, which could further threaten the Taiz-Aden GLOC.
3. Iranian officials are likely threatening to attack US targets outside the Middle East to deter the United States from resuming military action against Iran. These threats follow US President Donald Trump's recent warning that the United States could resume military action against Iran after the US midterm elections in November.
4. A senior Iranian delegation comprised of individuals close to Iranian Supreme Leader Mojtaba Khamenei visited southern Lebanon on October 1. The delegation included Islamic Revolutionary Guard Corps (IRGC) officer Brigadier General Hossein Yekta, who has played a significant role in internal security activities and recruitment. His inclusion in the delegation is notable given Hezbollah's growing unpopularity in parts of southern Lebanon and its ongoing attempts to reconstitute its military capabilities.



Toplines

Houthi forces temporarily disrupted a section of the Yemeni government-aligned forces' primary ground line of communication (GLOC) between Taiz City and Aden City on October 1 as part of their effort to isolate Yemeni government-aligned forces in Taiz City. Houthi forces detonated an improvised explosive device (IED) on the Hijat al Abd road in al Muharraqah Village, Lahij Governorate, on October 1, which temporarily disrupted the main supply route (MSR) that connects Taiz City and Aden City, according to multiple Yemeni sources and geolocated imagery.[1] Two anti-Houthi Yemeni sources reported that Houthi forces infiltrated al Muharraqah and the nearby Najd al Bard area, detonated an IED on the Hijat al Abd road, and then withdrew after Yemeni government-aligned forces and local fighters repelled them.[2] The Houthis have consistently sought to sever the Taiz-Aden GLOC in recent weeks. Yemeni government-aligned forces repelled an attempted Houthi advance to capture a nearby section of the Hijat al Abd road on September 24, for example.[3]

The Houthi attack demonstrates the group's ability to render the wider GLOC inoperable. The Hijat al Abd road lies north of a second, longer MSR. The Houthi IED attack will likely force Yemeni government-aligned forces to temporarily rely solely on this longer southern MSR south of al Turbah while the northern MSR is repaired. Reliance on the southern MSR, as opposed to both the northern and southern MSRs, will likely temporarily constrain Yemeni government-aligned forces' resupply and reinforcement efforts amid heavy fighting across Taiz Governorate. Both the southern and northern MSRs connect to key intersections. Successful Houthi attacks on the intersections or parts of the GLOC where there are no feasible alternative routes would render the wider GLOC inoperable.



The Houthis do not have to capture or control the intersections to effectively sever the Taiz-Aden GLOC, because sustained Houthi fire on the intersections or other sections of the GLOC could make the route too dangerous to use. Houthi severance, capture, or effective control of the intersections would effectively encircle Yemeni government-aligned forces defending Taiz City, as the intersections are located on the sole GLOC through which government forces can resupply and reinforce forces in the city. A DC-based Yemeni analyst assessed on September 10 that alternative GLOCs through mountain routes present greater challenges for resupply and reinforcement efforts.[4] Long-term Houthi control of the Taiz-Aden GLOC would likely force Yemeni government-aligned forces in Taiz City to surrender or retreat. The Houthis' severance of the Taiz-Aden GLOC would impose multiple dilemmas on Yemeni government-aligned forces, such as improving the Houthis' ability to threaten the Yemeni government's capital in Aden City, as ISW-CTP has previously assessed.[5]

Houthi forces simultaneously continue to advance in northeastern and northwestern Taiz Governorate, which could further threaten the Taiz-Aden GLOC. Geolocated imagery on October 1 indicates that Houthi forces advanced southwestward into al Salaf Village, Samah District.[6] This advance supports a broader Houthi offensive effort on the Samah axis. This offensive could put further pressure on the Taiz-Aden GLOC, given that al Salaf is less than 10 kilometers northeast of the GLOC. Separate geolocated imagery on October 1 indicates that Houthi armored forces advanced eastward toward Jabal Habashi from the Bani Baraki Village, Taiz Governorate.[7] Bani Baraki lies approximately 15 kilometers west of the Taiz-Aden GLOC. The Houthi advances come amid reports from multiple Yemeni government-aligned sources of intensified fighting on multiple fronts in Taiz Governorate.[8] A Yemeni military source told Saudi media on October 1 that Yemeni government-aligned forces inflicted at least 80 casualties on Houthi fighters during fighting across several axes in Taiz Governorate.[9] ISW-CTP is unable to confirm these casualty figures.

Iranian officials are likely threatening to attack US targets outside the Middle East to deter the United States from resuming military action against Iran. Three senior Iranian officials and an "insider" familiar with discussions told Reuters on October 1 that Iranian decision-makers are reviewing plans to expand potential targets beyond US assets in the region to possibly countries outside the region if the United States renews strikes on Iran.[10] The sources' decision to reveal these plans to Western media and condition the potential expansion of targets on the resumption of US strikes indicates that the regime is very likely attempting to use these public threats to deter the United States from resuming military action against Iran. This report follows US President Donald Trump's recent warning that the United States could resume military action against Iran after the US midterm elections in November.[11] English-language regime media separately circulated comments from a senior Islamic Revolutionary Guards Corps (IRGC) Aerospace Force officer that Iran has developed the ability to hit moving targets with long-range ballistic missiles.[12] The regime's circulation of the officer's comments in English may be part of the regime's information operation to deter the United States from striking Iran.[13]

A senior Iranian delegation comprised of individuals close to Iranian Supreme Leader Mojtaba Khamenei visited southern Lebanon on October 1.[14] IRGC officer Brigadier General Hossein Yekta participated in the visit. Yekta, who served in the same battalion as Mojtaba during the Iran-Iraq War, is involved in IRGC recruitment and indoctrination activities.[15] Yekta has played a significant role in Iranian internal security activities. Yekta publicly expressed support for using lethal force against protesters during the regime's violent crackdown on the Winter 2025-2026 protests in Iran, for example.[16] The delegation also included Alireza Panahian, an ultra-hardline cleric who similarly served in the same battalion as Mojtaba during the Iran-Iraq War.[17]

The Iranian delegation's visit to Lebanon comes amid a time of unprecedented Hezbollah weakness. Hezbollah has lost numerous fighters, weapons, and infrastructure in southern Lebanon since it went to

war with Israel in March 2026.[18] The group continues to lack experienced commanders and a charismatic leader, increasingly relying on Iranian guidance.[19] Hezbollah is also increasingly unpopular in southern Lebanon, where it has traditionally maintained strong support.[20] It is possible that this Iranian delegation traveled to Lebanon to support Hezbollah's ongoing reconstitution efforts. Yekta's background as a recruiter and an internal security official is notable given Hezbollah's unpopularity in parts of southern Lebanon and its ongoing attempts to reconstitute its military capabilities.[21]

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 security forces clashed with fighters in Sistan and Baluchistan Province on September 30 and October 1, highlighting the ongoing threat that anti-regime militant groups pose to the regime. Regime media reported on September 30 that an unspecified number of gunmen killed a Law Enforcement Command (LEC) officer in Rask, Sistan and Baluchistan Province.[22] Regime media separately reported on October 1 that the IRGC Ground Forces killed six unidentified fighters and seized several explosive devices during a security operation in the Manzil-e Ab area in Zahedan, Sistan and Baluchistan Province.[23]

British Prime Minister Andy Burnham stated on September 30 that there are “strong indications that Iran played a part” in the incident at Royal Air Force (RAF) Fairford on September 27.[24] Sky News reported on October 1 that British police arrested a dual British-Iranian national in London on suspicion of preparing “terrorist acts” at RAF Fairford.[25] The Iranian Foreign Affairs Ministry called Burnham's comments “false accusations” and summoned the UK ambassador to Iran for consultations.[26]

Lebanon

Hezbollah is attempting to obtain assurances from the Syrian government that Syria will not interfere with Hezbollah's affairs while also likely attempting to undermine Lebanese government-Syrian relations. Hezbollah's success in these efforts would support Hezbollah's cross-border smuggling operations between Lebanon and Syria.

Hezbollah and Syrian government officials secretly met in Turkey on an unspecified date in September, according to six unspecified US, Lebanese, and Syrian sources speaking to Reuters on October 1.[27] Neither the Lebanese government nor any party in the reported talks has commented on the meeting at the time of this writing. The Syrian delegation reportedly pledged to not intervene militarily in Lebanon to disarm Hezbollah, according to Reuters sources.[28] The Syrian delegation asked Hezbollah to stop conducting cross-border smuggling operations and supporting militant cells in Syria, to which Hezbollah did not agree.[29] Hezbollah reportedly pledged to "not interfere in Syria's affairs," however.[30] Hezbollah will almost certainly not accept Syria's demands because Hezbollah is actively attempting to reconstitute its military capabilities, in large part by smuggling weapons into Lebanon from Syria.[31] Hezbollah is also very likely training and equipping Syrian Assadist insurgents to prevent Syrian government forces from disrupting Hezbollah's military activities.[32]

Hezbollah is likely attempting to undermine Lebanese government-Syrian relations by participating in secret talks with the Syrian government, regardless of whether or not Hezbollah can receive assurances that Syria will not intervene in Hezbollah's affairs. The Lebanese government seeks to disarm Hezbollah, strip the group of the ability to conduct foreign policy on behalf of Lebanon, and remove Hezbollah and Iranian influence from Lebanon.[33] The Lebanese government has also worked to establish closer bilateral security ties with Syria in recent months, including cooperation and intelligence sharing on cross-border smuggling.[34] Hezbollah's meeting with Syrian officials treats Hezbollah as a legitimate Lebanese state actor, regardless of whether the Syrian government views Hezbollah in that way, which could negatively impact Lebanese government-Syrian relations. Hezbollah has an incentive to disrupt Lebanese government-Syrian relations, including border security cooperation, to sustain cross-border smuggling operations.

Iraq

Iraqi Prime Minister Ali al Zaydi formally announced on October 1 that Iranian-backed Iraqi militias must disarm by June 30, 2027.[35] This announcement follows Zaydi's recent trip to the UN General Assembly (UNGA), during which he discussed militia disarmament with US Secretary of State Marco Rubio on September 21.[36] Zaydi may have also discussed militia disarmament with Iranian President Masoud Pezeshkian during their September 23 meeting, given the Iranian regime's opposition to disarmament.[37] The new disarmament deadline is consistent with Zaydi's remarks to the *New York Times* (NYT) on September 21, during which he outlined a two-phase plan to disarm the militias by June 2027.[38] He stated at the time that the Iraqi federal government would release the plan's full details on September 30, but Iraqi Foreign Minister Fuad Hussein announced on September 30 that the Iraqi government will release a draft disarmament plan with "specific timeframes" in the "coming days." [39]

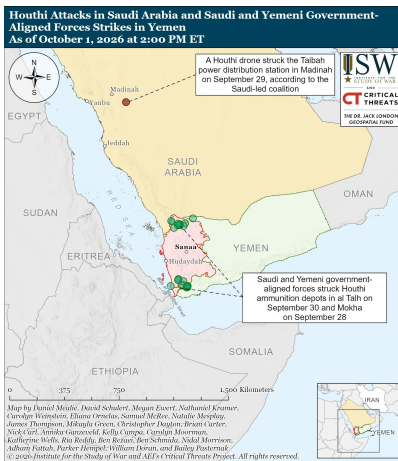
The Iraqi federal government's delay in releasing the full details of the disarmament plan suggests that it has yet to finalize a disarmament agreement with some Iranian-backed Iraqi militias. An informed source told Iraqi media on October 1 that an unspecified militia demanded the formation of a "new ministry" during recent negotiations with the Shia Coordination Framework committee tasked with negotiating with the militias, which indicates that the committee has not yet negotiated a final agreement.[40]

Some Iranian-backed Iraqi actors may pressure the Iraqi federal government to stop storing its oil sale revenue in a New York Federal Reserve account to limit US leverage over Iraqi economic and political affairs. The Central Bank of Iraq has managed an account at the New York Federal Reserve on behalf of the Iraqi Finance Ministry since 2003 that holds the Iraqi federal government's revenue from oil exports in US dollars.[41] Iranian-backed Iraqi militia Asaib Ahl al Haq's political wing, Sadiqoun, issued a statement on October 1 that implicitly criticized how the United States uses dollar shipments as a "pressure tactic" to influence Iraqi politics.[42] Iranian-backed Iraqi actors have previously called for an end to US "hegemony" over the Iraqi economy, but Sadiqoun's statement appears to mark the first time since 2023 that an Iranian-backed Iraqi militia specifically criticized US control over Iraq's oil revenues.[43] The United States has recently used its control over dollar shipments to pressure the Iraqi government to curb Iranian influence in Iraq and disarm Iranian-backed Iraqi militias.[44] The United States also fully withdrew its forces from Iraq on September 30, which was one of Iranian-backed Iraqi actors' primary objectives under their broader objective to remove US influence from Iraq.[45] Iranian-backed Iraqi actors may devote more energy toward pressuring the Iraqi government to reduce economic dependence on the United States following the US military withdrawal to further remove US influence from Iraq.

Arabian Peninsula

The Saudi-led coalition announced on October 1 that the Houthis conducted a drone attack targeting the Taibah power distribution station in Madinah in western Saudi Arabia on September 29.[46] The coalition said that the attack damaged one transformer but did not disrupt the wider electricity network.[47] Houthi media denied that the Houthis conducted the drone attack.[48] The attack on the power distribution station demonstrates the Houthis' willingness to target Saudi civilian infrastructure serving domestic electricity needs, which would mark an expansion beyond previous strikes that primarily focused on state oil infrastructure and Saudi military infrastructure.[49]

Saudi and Yemeni government-aligned forces continued to strike Houthi military and communications infrastructure in northwestern and southwestern Yemen. A Yemeni government-aligned airstrike targeted a Houthi ammunition depot in Al Talh, Saada Governorate, on September 30.[50] Houthi media reported several Saudi airstrikes on communications infrastructure in Saada Governorate on October 1.[51] These strikes may have been intended to degrade the Houthis' ability to attack Saudi Arabia given their concentration in northwestern Yemen. Houthi military spokesperson Brigadier General Yahya Saree claimed that Saudi forces conducted 47 airstrikes on October 1 that targeted communications and civilian infrastructure.[52] Likely Saudi airstrikes also targeted a Houthi ammunition depot in Mocha Port, Taiz Governorate, in southwestern Yemen on September 28, according to geolocated satellite imagery.[53]



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Iran Update, October 2, 2026



William Doran, Nidal Morrison, Adham Fattah, Bailey Pasternak, Ria Reddy, Brian Carter

Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

1. Saudi Arabia is reportedly preparing to support a Yemeni government offensive to recapture territory on the southern Red Sea coastal plain from the Houthis. Yemeni government forces likely have the capacity to successfully execute such an offensive, assuming the objectives are limited.
2. Saudi allies Pakistan and Turkey are providing defensive and offensive military support to Saudi Arabia and the Yemeni government. Pakistani and Turkish military support to Saudi Arabia reflects increasing military cooperation between the three countries under the "Mecca Pact," a mutual defense treaty which the countries signed on August 7.
3. Saudi and Yemeni government-aligned forces are attempting to disrupt Houthi advances in southwestern Yemen by conducting airstrikes targeting Houthi front-line positions, reinforcements, supply centers, and command and control (C2).
4. Iranian-backed Iraqi militias Kataib Sayyid al Shuhada and Harakat Ansar Allah al Awfiya announced their commitment to an unspecified Shia Coordination Framework disarmament agreement on October 1. The agreement will likely enable the militias to retain access to their weapons, which would not meet US demands regarding militia disarmament.



- 1 **Yemen** – Saudi Arabia is reportedly preparing to support a Yemeni government offensive to recapture territory on the southern Red Sea coastal plain from the Houthis. Yemeni government forces likely have the capacity to successfully execute such an offensive, assuming the objectives are limited.
- 2 **Yemen** – Saudi allies Pakistan and Turkey are providing defensive and offensive military support to Saudi Arabia and the Yemeni government. Pakistani and Turkish military support to Saudi Arabia reflects increasing military cooperation between the three countries under the "Mecca Pact", a mutual defense treaty which the countries signed on August 7.

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Toplines

Saudi Arabia is reportedly preparing to support a Yemeni government offensive to recapture territory on the southern Red Sea coastal plain from the Houthis. Yemeni government forces likely have the capacity to successfully execute such an offensive, assuming the objectives are limited. Western and regional officials told Reuters on October 2 that Saudi Arabia plans to coordinate ground operations and provide air support to Yemeni government-aligned forces in an offensive to recapture territory and ports on the Red Sea coast that the Houthis captured between September 9 and 11.[1] This is a relatively limited objective that requires a roughly 50-mile advance in an open coastal plain where the Houthis are at a considerable disadvantage given Saudi airpower. The sources claimed that Saudi leaders are unwilling to enter any truce negotiations with the Houthis as long as the group controls territory along the Bab al Mandeb Strait, which implies some requirement for military operations in order to reverse the present situation.[2] The Houthis view themselves as holding the upper hand in the conflict at present and therefore will not accept a ceasefire unless the Saudis accept their demands.

The offensive could take the form of either one push along the southwestern coast or several simultaneous attacks across the Yemeni frontlines designed to stretch Houthi bandwidth.[3] Multiple offensives would force the Houthis to devote forces to various frontlines. The operational movement required to shift these forces would probably present targets for Saudi interdiction as well.

The Houthis have constructed a variety of defenses along the coast, but these defenses are likely designed to stop ground assaults, not protect defenders against airpower. The Houthis have also constructed and expanded earthwork defenses, such as berms, across the coastal plain's southeastern edge to defend positions against direct fire and enemy advances, although these defenses are rudimentary.[4] These defenses can be suppressed or destroyed by Saudi airpower, however. The Houthis would require more time to build up sufficient passive defenses to survive effective air strikes against these positions.[5] Some "sufficient" passive defenses could include subterranean complexes, for example. The Houthis will almost certainly build such defenses if given time and space to do so.

Yemeni government forces likely have the capacity to conduct an offensive along the lines described by Reuters, and similarly limited offensives have been successful in the past. The Yemeni government and the factions aligned with it currently face an existential threat from the Houthis that is particularly salient given recent Houthi military victories.[6] These forces, though fractious, have come together in the past to unite and achieve operational success against the Houthis. The United Arab Emirates (UAE) and Saudi Arabia orchestrated a political agreement between competing UAE-backed and Saudi-backed factions in

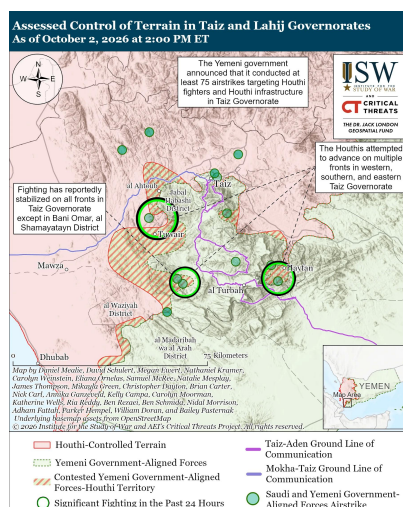
2021, for example, that enabled an offensive against the Houthis to relieve the pressure on Marib City.[7] This offensive involved the Giants Brigades — presently on the frontline in southwestern Yemen —advancing against the Houthis with Saudi air support.[8] Houthi forces historically have had substantial issues operating in open terrain like the terrain they currently occupy along the southwestern coast. Saudi airpower has frequently conducted effective attacks against the Houthis in similarly open areas. Yemeni government-aligned forces have also previously conducted successful offensives against the Houthis in far less permissive terrain, such as in Aden in 2015.[9]

Yemeni government-aligned forces face challenges that may complicate their efforts to mount a successful offensive against the Houthis, however, and could cause it to fail. Yemeni government-aligned forces are a loose coalition of regional militias and military units that have previously failed to coordinate attacks against the Houthis, and in some cases have engaged one another in combat.[10] Western, regional, and Yemeni officials told Reuters on September 16 that Yemeni government-aligned forces' internal divisions and weak command-and-control (C2) structure hindered defensive efforts during the Houthis' coastal plain offensive.[11] This friction is not insurmountable, and the Saudis have over a decade of experience in managing these challenges — particularly ahead of military offensives.

Saudi allies Pakistan and Turkey are providing defensive and offensive military support to Saudi Arabia and the Yemeni government. Pakistani and regional officials told Reuters on October 2 that Pakistan and Turkey have supplied military aid to Saudi Arabia to combat the Houthis in Yemen.[12] A Pakistani official said that Pakistan dispatched four cargo aircraft carrying military equipment to Yemeni government-aligned forces in Aden, the government's provisional capital, in September.[13] The equipment, including light artillery and drones, could support a Yemeni government offensive against the Houthis on the coastal plain.[14] Pakistan has also recently deployed between 30,000 and 40,000 military personnel, including soldiers and military advisers, to Saudi Arabia, according to a second Pakistani official.[15] The official claimed that the Pakistani military personnel would provide air defense support to Saudi Arabia and help protect Saudi Arabia's borders.[16] The Houthis are likely to consider a sizeable international force presence on the Saudi Arabia-Yemen border to constitute a significant threat, as the group already engages Yemeni government-aligned forces in combat in areas along the Saudi Arabia-Yemen border and has conducted attacks on Saudi bases near the border.[17] Pakistani and Turkish military support to Saudi Arabia reflects increasing military cooperation between the three countries under the "Mecca Pact," a mutual defense treaty which the countries signed on August 7.[18]

Saudi and Yemeni government-aligned forces are attempting to disrupt Houthi advances in southwestern Yemen by conducting airstrikes targeting Houthi front-line positions, reinforcements, supply centers, and C2. Houthi fighters engaged Yemeni government-aligned forces and attempted to advance on several fronts in western, southern, and eastern Taiz Governorate, which a Marib-based journalist characterized as the Houthis' "largest coordinated assault" across Taiz, on October 1 and 2.[19] The Houthis likely attempted to sever the Yemeni government's last ground line of communication (GLOC) between Taiz City and Aden, encircle Taiz City, and seize favorable terrain overlooking the coastal plain.[20] A US-based Yemen analyst reported that most front lines in Taiz Governorate, except for the Bani Omar front in southwestern Taiz Governorate, had "stabilized" by October 2.[21] Yemeni government-aligned forces conducted at least 75 airstrikes targeting Houthi fighters, reinforcements, weapons depots, and sustainment centers throughout Taiz Governorate since ISW-CTP's last data cutoff on October 1.[22] These strikes targeted both front-line Houthi forces and military resources that are necessary to sustain Houthi advances across Taiz Governorate. The Yemeni government also announced that it struck "high-value targets" in Sanaa City, the Houthi-controlled Yemeni capital.[23] Saudi and Yemeni government airstrikes provide close air support to government-aligned forces, disrupt Houthi sustainment and logistics efforts, and target Houthi leadership and military capabilities central to the group's offensive campaigns.[24] These strikes advance various objectives in

the Saudi-Yemeni government air campaign, which intends to degrade the Houthis' combat effectiveness.



Iranian-backed Iraqi militias Kataib Sayyid al Shuhada and Harakat Ansar Allah al Awfiya announced their commitment to an unspecified Shia Coordination Framework disarmament agreement on October 1. The agreement will likely enable the militias to retain access to their weapons, which would not meet US demands regarding militia disarmament.[25] The announcements came shortly after Iraqi Prime Minister Ali al Zaydi stated on October 1 that all militias must disarm by June 2027.[26] The text of the framework disarmament agreement that both militias agreed to is not public, but UK-based, Qatari-owned media reported on September 22 that the framework recently approved some details of an Iraqi government plan to disarm Iranian-backed Iraqi militias by June 2027.[27] The plan reportedly calls for the creation of a new directorate within the Popular Mobilization Forces (PMF) to receive militia weapons and determine storage and usage protocols for them under Iraqi federal government supervision.[28] The plan's inclusion of this stipulation suggests that the plan also requires the militias to surrender their weapons to the PMF. Iranian-backed Iraqi militias' infiltration of the PMF suggests that the militias would very likely retain access to their weapons under this disarmament plan, however.[29] Kataib Sayyid al Shuhada has also repeatedly refused to disarm for ideological reasons.[30] Kataib Sayyid al Shuhada's support for this agreement, therefore, further suggests that the group calculates that the agreement will fail to disarm Iranian-backed Iraqi militias.

US and Partner Military Operations

The United States deployed the *USS Theodore Roosevelt* carrier strike group (CSG) to the Middle East on September 27 to replace the *USS George Washington* CSG.[31] The United States also deployed an amphibious ready group (ARG) that will replace the ARG presently in the region.

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 recent uptick in clashes between Iranian regime security forces and anti-regime fighters in southeastern Iran highlights the threat that anti-regime groups pose to the regime. Islamic Revolutionary Guards Corps- (IRGC) affiliated media reported on October 2 that the IRGC Ground Forces killed two unspecified fighters west of Rask, Sistan and Baluchistan Province, and seized weapons and a Starlink device.[32] The engagement comes after unknown gunmen killed a Law Enforcement Command (LEC) officer at a police checkpoint in Rask on September 30.[33] The BBC, citing local media groups, reported on October 2 that an unknown group separately detonated an IED targeting a Fatemiyoun Division vehicle, killing five.[34] The Fatemiyoun Division is an IRGC Quds Force-controlled Afghan Shia Militia that conducts internal security operations in Sistan and Baluchistan Province.[35] The IED attack comes after the IRGC Ground Forces killed six Mobarizoun Popular Front fighters and seized several explosive devices during a large security operation in the Manzil-e Ab area in Zahedan on October 1.[36] An anti-regime group previously detonated an IED targeting regime security forces on the Zahedan-Khash Road in Sistan and Baluchistan Province on July 26.[37] The IED attacks suggest that at least some of the anti-regime fighters in southeastern Iran have the ability to conduct sophisticated attacks. ISW-CTP noted on September 21 a slight uptick in regime security operations in Sistan and Baluchistan.[38]



The United States is targeting Iran's remaining channels for trade as the US naval blockade and recent US sanctions on Iranian airlines severely restrict Iran's ability to trade. The US Treasury Department sanctioned three Iranian railway companies on October 1 to constrain Iran's ability to trade through alternative routes amid the US naval blockade.[39] The US blockade on Iranian ports has forced Iran to rely more heavily on alternative transport routes, including by rail transport and air. Bloomberg reported in May 2026 that cargo trains from Xi'an, People's Republic of China, to Tehran increased from roughly one per week before the war to roughly twice a week after the blockade began, for example.[40] The United States also recently imposed secondary sanctions on countries that support Iran's aviation sector in August and warned foreign firms in September against providing aircraft transfers, cargo services, sales support, or other assistance to sanctioned Iranian carriers.[41] Several

countries, including the United Arab Emirates, Georgia, Oman, Azerbaijan, and Iraq, have complied with the US sanctions and restricted or suspended Iranian airline operations in recent days, which will restrict Iran's international air access and further deepen the regime's economic isolation.[42]

The US Treasury also sanctioned Iran's automotive sector on October 1.[43] Iran's automotive sector is one of Iran's largest economic sectors outside the oil and gas industries and generates revenue for the Islamic Revolutionary Guards Corps.

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

The United States delivered a Patriot missile battery to Saudi Arabia in September to help protect Saudi oil infrastructure, according to two US officials speaking to Axios on October 2.[44] The sources added that the United States also recently delivered one Patriot battery to Qatar in order to help protect Qatari energy infrastructure from possible Iranian attacks.[45] Saudi and allied air defenders, including Greek forces, have been defending Saudi infrastructure.[46] Saudi air defenses intercepted one ballistic missile over Jizan and four ballistic missiles and four drones over Khamis Mushait since ISW-CTP's last data cutoff.[47] The Houthis likely targeted Saudi energy infrastructure in Jizan. 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]

POWERED BY:  BABEL STREET

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Iran Update, October 3, 2026



William Doran, Adham Fattah, 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 and the broader Middle East. Weekday updates cover events from the past 24-hour period, whereas weekend updates are abbreviated and cover the Houthi-Saudi conflict and major breaking developments related to the war with Iran.

Key Takeaways

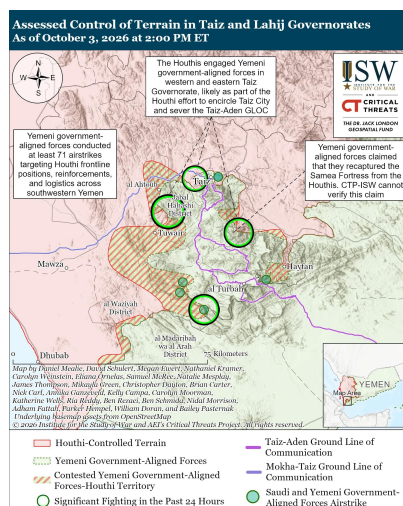
1. Saudi or Yemeni government-aligned forces conducted airstrikes on Sanaa City on October 3, likely to degrade Houthi capabilities central to the group's offensive campaigns. Yemeni government-aligned forces also struck Houthi frontline positions, reinforcements, and logistics throughout southwestern Yemen. Yemeni Armed Forces Spokesperson Majed al Nuzaili claimed that strikes on Houthi reinforcements and support convoys have caused a state of "deprivation" that is weakening Houthi forces' ability to fight in Taiz Governorate.
2. The Houthis attempted to advance on fronts in western and eastern Taiz Governorate on October 2 and 3, likely as part of the Houthi effort to encircle Taiz City and sever the Yemeni government's last ground line of communication between Taiz City and Aden. Yemeni media reported that the Houthis' attempted advances failed, and ISW-CTP has also not observed evidence of significant Houthi advances on these fronts at the time of this writing.

Toplines

Saudi or Yemeni government-aligned forces conducted airstrikes on Sanaa City on October 3, likely to degrade Houthi capabilities central to the group's offensive campaigns.[1] Local sources told a Yemeni news outlet on October 3 that Saudi or Yemeni government-aligned forces conducted at least 13 airstrikes targeting several areas in Sanaa City. Yemeni government-aligned forces identified the targets as "legitimate vital military targets." [2] Yemeni Armed Forces Spokesperson Majed al Nuzaili stated that the strikes demonstrate Yemeni government-aligned forces' ability to conduct "strategic attacks" on valuable military targets in the Houthi-controlled capital, which is far from the front lines in southern and eastern Yemen. [3] Yemeni government-aligned forces, Yemeni journalists, and international media have reported attacks on Houthi weapons experts, missile and drone commanders, and other "high-value targets" in Sanaa City in recent days. [4] Saudi and Yemeni government-aligned

forces have struck targets in Sanaa City and other military sites deep in Houthi-controlled northwestern Yemen in order to degrade Houthi command-and-control (C2) and military capabilities that are necessary for sustaining offensive campaigns in Yemen and against Saudi Arabia.[5]

Yemeni government-aligned forces also struck Houthi frontline positions, reinforcements, and logistics throughout southwestern Yemen on October 2 to disrupt attempted Houthi advances and degrade the group's ability to sustain offensive combat efforts.[6] Nuzaili announced on October 2 that Yemeni government-aligned forces conducted at least 71 airstrikes on Houthi forces and logistics in Taiz Governorate.[7] Nuzaili claimed that strikes on Houthi reinforcements and support convoys have caused a state of "deprivation" that is weakening Houthi forces' ability to fight in Taiz Governorate.[8] The Houthis attempted to advance on fronts in western and eastern Taiz Governorate on October 2 and 3, likely as part of the Houthi effort to encircle Taiz City and sever the Yemeni government's last ground line of communication (GLOC) between Taiz City and Aden.[9] Yemeni media reported on October 3 that the Houthis' attempted advances failed, and ISW-CTP has also not observed evidence of significant Houthi advances on these fronts at the time of this writing.[10]



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

The Islamic Revolutionary Guards Corps Navy likely attacked two tankers in the Strait of Hormuz on October 2 as part of Iran's ongoing effort to disrupt international shipping and coerce countries to recognize Iranian control of the strait. United Kingdom Maritime Trade Operations (UKMTO) reported on October 2 that unspecified projectiles struck a tanker transiting outbound through the strait and an oil tanker approximately four nautical miles east of Oman.[11] UKMTO has reported six attacks on vessels in or near the strait since September 30.[12] The Iranian

attacks on vessels come as US efforts to restore freedom of navigation continue to challenge Iran's ability to enforce control over the strait.[13]

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

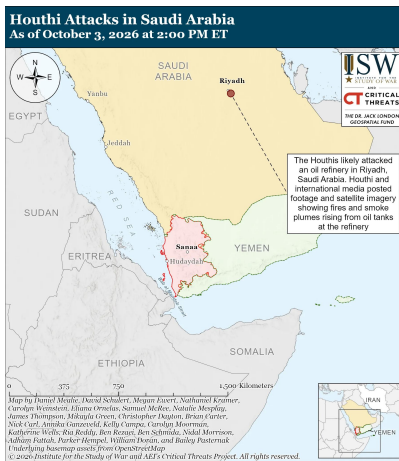
Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

The Houthis likely conducted an attack on a major oil refinery in Riyadh, Saudi Arabia, on October 3.[14] Houthi media posted footage and satellite imagery showing large smoke plumes and fires rising from oil storage tanks at the Saudi Aramco Riyadh Refinery on October 3 but did not explicitly attribute the damage to a Houthi attack.[15] Reuters similarly reported fires and large smoke plumes near a Saudi Aramco facility in Riyadh on October 3. An independent geospatial analyst separately reported that the Houthis attacked oil refineries in Riyadh and Yanbu over the past 24 hours.[16] The Houthis likely attacked the refinery in Riyadh as part of the group's strike campaign against Saudi oil infrastructure in order to maximize Saudi political and economic costs and compel Saudi Arabia to surrender to Houthi demands.[17] 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.[18]



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