Iran Update, October 25, 2026

Nidal Morrison, Adham Fattah, Benjamin Schmida, Kelly Campa

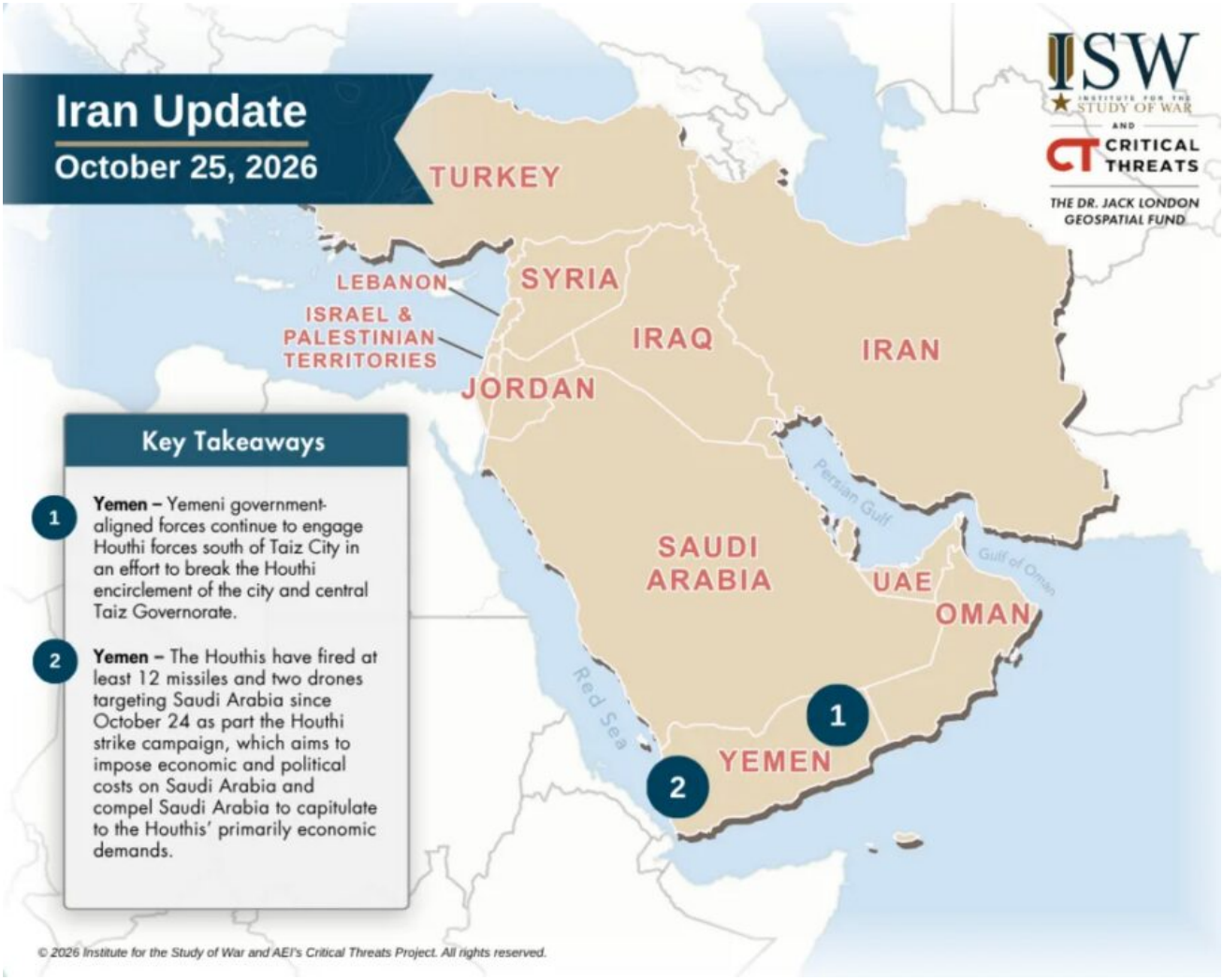
Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran 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. The Houthis have fired at least 12 missiles and two drones targeting Saudi Arabia since October 24 as part of the Houthi strike campaign, which aims to impose economic and political costs on Saudi Arabia and compel Saudi Arabia to capitulate to the Houthis' primarily economic demands.
2. Yemeni government-aligned forces continue to engage Houthi forces south of Taiz City in an effort to break the Houthi encirclement of the city and central Taiz Governorate.

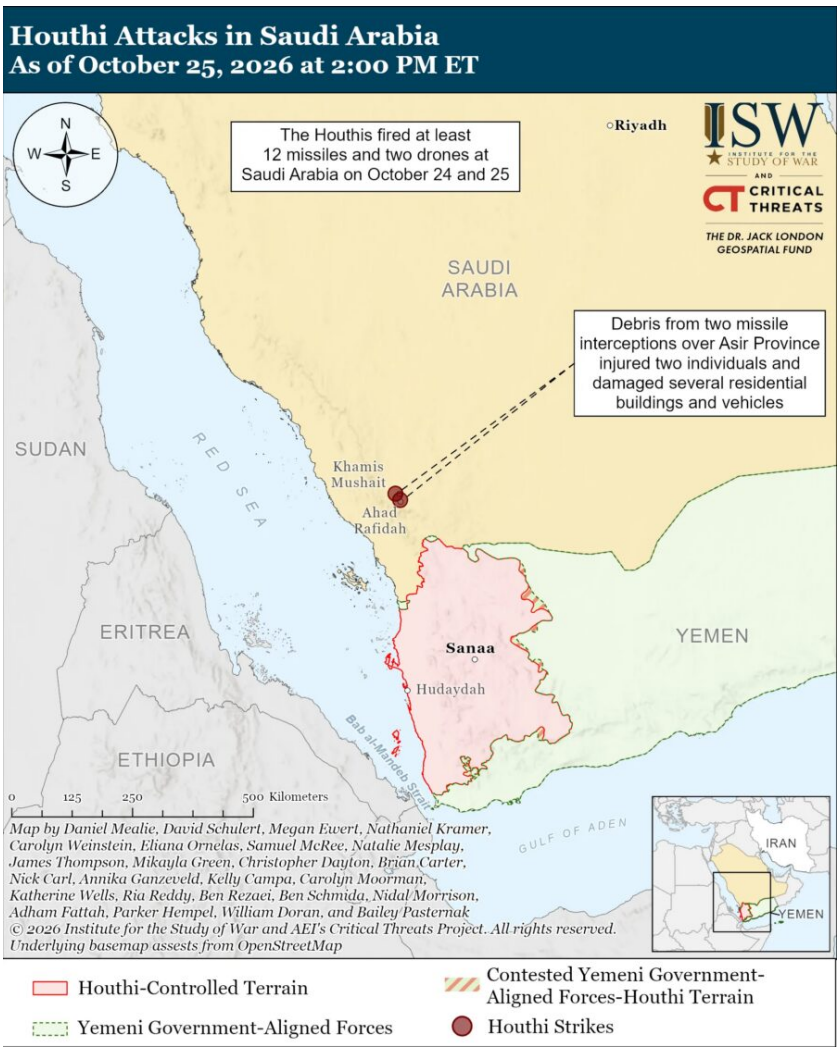
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Toplines

The Houthis have fired at least 12 missiles and two drones targeting Saudi Arabia since October 24 as part the Houthi strike campaign, which aims to impose economic and political costs on Saudi Arabia and compel Saudi Arabia to capitulate to the Houthis' primarily economic demands. The Saudi Joint Forces Command reported that Saudi air defenses intercepted 11 missiles over southern Saudi Arabia, including Asir Province, on October 25.[1] Debris from two missile interceptions over Asir Province injured two individuals and damaged several residential buildings and vehicles, according to the Saudi Civil Defense Directorate.[2] Saudi forces also intercepted two drones and a missile over Riyadh Province on October 24 after ISW-CTP's data cutoff.[3] The Houthis have not yet claimed the attacks as of this writing. The Houthis have repeatedly targeted Saudi critical infrastructure, including energy and transport infrastructure, as part of the Houthis' ongoing strike campaign. The Houthis seek to compel Saudi Arabia to halt military operations against the Houthis and accept the Houthis' demands, which include lifting Saudi controls on Houthi-controlled ports and airports and granting the Houthis control over Yemen's oil and gas resources.[4]

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Yemeni government-aligned forces continue to engage Houthi forces south of Taiz City in an effort to break the Houthi encirclement of the city and central Taiz Governorate. Anti-Houthi media sources reported that Yemeni government-aligned forces engaged Houthi forces near al Aqroud, al Misrakh District on October 25.[5] An anti-Houthi source also reported that Houthi artillery struck civilian homes in al Aqroud on October 25, which further indicates that fighting between government forces and the Houthis has continued in that area.[6] Yemeni government-aligned forces will gain little from breaking the Houthi encirclement of central Taiz unless they also recapture and secure key segments of the Taiz-Aden ground line of communication to restore reliable routes for resupply and reinforcements to Taiz City.[7]

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*

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- *Restore deterrence vis-à -vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

Nothing significant to report.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

See topline section.

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Endnotes

[1] https://x.com/CJFCSpox/status/2114250213913440577 ;
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[2] https://x.com/SaudiDCD/status/2114347309010202819
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[5] https://x.com/FaresALhemyari/status/2114392696026476585 ; https://x.com/ALyemennow/status/2114394408753959121
[6] https://x.com/FaresALhemyari/status/2114326358683697275 ; https://x.com/FaresALhemyari/status/2114413208085700678
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Iran Update, October 26, 2026

Adham Fattah, Parker Hempel, Bailey Pasternak, Benjamin Schmida, Nidal Morrison, Ben Rezaei, Ria Reddy, Kelly Campa

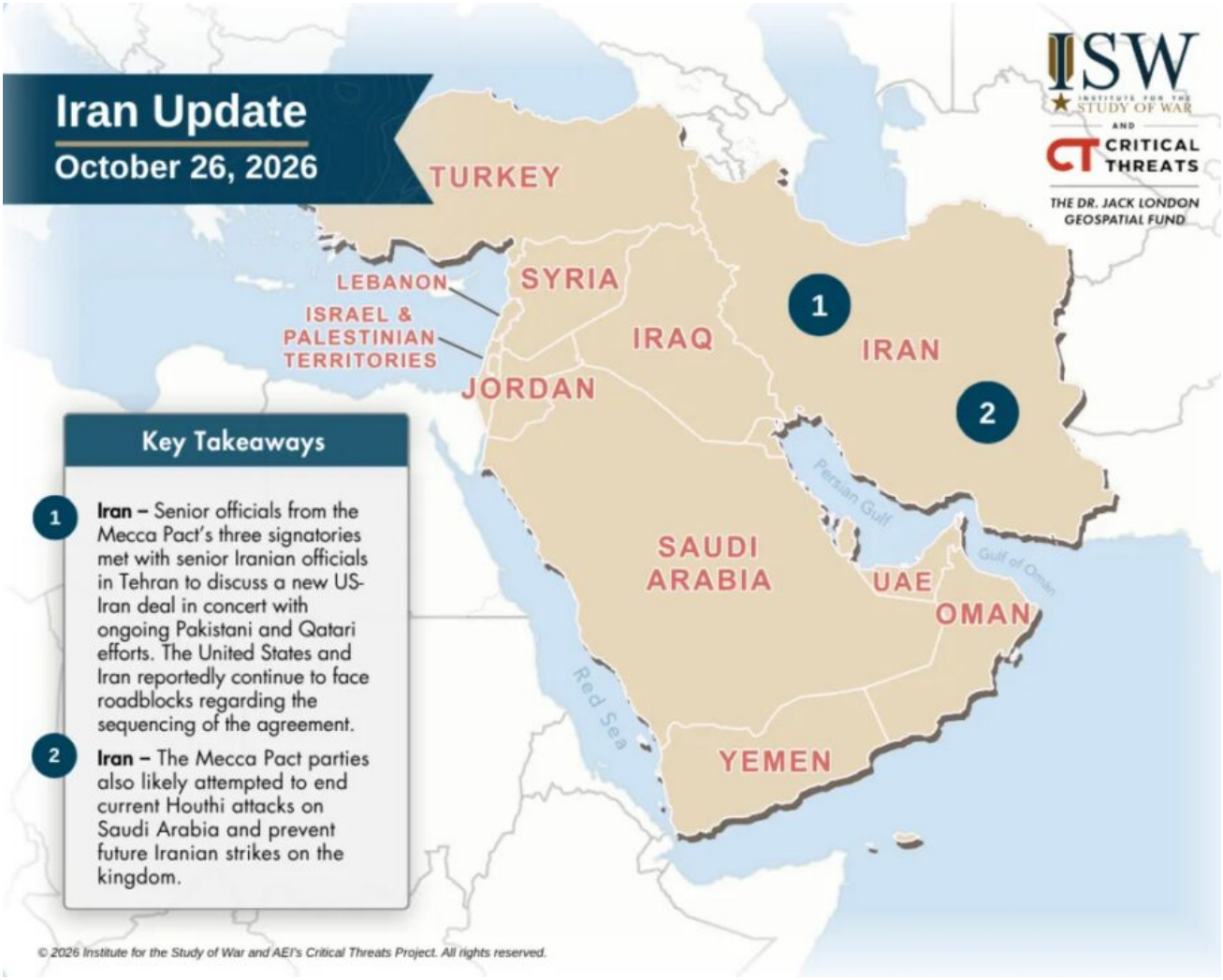
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Key Takeaways

1. Senior officials from the Mecca Pact's three signatories met with senior Iranian officials in Tehran on October 26 to discuss a new US-Iran deal in concert with ongoing Pakistani and Qatari efforts. The United States and Iran reportedly continue to face roadblocks regarding the sequencing of the agreement.
2. The Mecca Pact parties also likely attempted to end current Houthi attacks on Saudi Arabia and prevent future Iranian strikes on the kingdom. Gulf-based diplomatic sources told Israeli media that Saudi Arabia attempted to negotiate a ceasefire with the Houthis during a meeting with Iranian officials.
3. The Houthis may seek to avoid striking US targets in support of Iran if the United States and Israel resume strikes in Iran to prevent US retaliation, which could weaken the group's current position relative to Saudi Arabia.
4. Iran has reportedly continued to fund Hezbollah's reconstitution of its military forces and capabilities.
5. Current indicators suggest that Hezbollah may not participate in a renewed Iranian conflict by attacking Israel in the near term. The Iranian regime may prefer to limit Hezbollah's involvement in such a round of conflict in order to prioritize Hezbollah's military reconstitution, given that any Hezbollah attacks on Israel would almost certainly provoke an Israeli response.

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Toplines

Senior officials from the Mecca Pact's three signatories met with senior Iranian officials in Tehran on October 26 to discuss a new US-Iran ceasefire amid reported US and Israeli preparations for another round of strikes in Iran. Saudi Arabia, Pakistan, and Turkey signed a mutual defense agreement, known as the Mecca Joint Defense Pact, in August 2026.[1] Saudi Defense Minister Khalid Bin Salman, Pakistani Army Commander Asim Munir, and Turkish National Intelligence Organization Director Ibrahim Kalin, who are the primary representatives of the pact thus far, discussed "regional security" with Iranian President Masoud Pezeshkian and Supreme National Security Council Secretary Mohsen Rezaei.[2] The Mecca Pact officials reportedly traveled to Tehran in concert with ongoing Pakistani and Qatari efforts to reach an agreement between the United States and Iran that prevents a wider regional war.[3] Two diplomats briefed on the ongoing talks told the *New York Times* on October 26 that Qatari mediators are trying to secure an agreement in which the United States and Iran would make "a series of concessions over a five-day period."[4] The diplomats added that those concessions include Iran reopening the Strait of Hormuz in exchange for the United States lifting its naval blockade on Iranian ports. An unspecified Gulf official told the *New York Times* that the Mecca Pact signatories' talks with Iran intended to "urge Iran to show flexibility."[5] The United States and Iran reportedly continue to disagree on the sequencing of the agreement.[6] Iran has repeatedly maintained that the United States must lift the naval blockade, provide sanctions relief, and recognize Iranian control over the strait before Iran makes any concessions.[7] The United States and Israel have reportedly prepared for another possible round of airstrikes in Iran after the US midterms.[8]

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The Mecca Pact parties likely sought to secure an end to current Houthi attacks on Saudi Arabia and prevent future Iranian strikes on the kingdom during the visit to Tehran.[9]The Mecca Pact officials' visit to Tehran marks the first instance in which the Mecca Pact signatories have traveled to a foreign country for a diplomatic engagement since signing the agreement in early August. Saudi Arabia is currently contending with daily Houthi missile and drone fire targeting Saudi military facilities and critical infrastructure, including airports and oil facilities.[10] Several Saudi partners are providing air defense support to the kingdom, but Saudi Arabia almost certainly seeks to avoid a scenario in which it faces simultaneous fire from the Houthis to the south and Iran to the northeast.[11] Iran has repeatedly attacked Saudi Arabia since March 2026 and has struck US and Saudi military bases, oil infrastructure, US diplomatic infrastructure, and other civilian sites.[12] Iran has threatened to "expand" its target bank in the event that the United States or Israel resume strikes on Iran by targeting regional energy infrastructure.[13] Sources familiar with recent warnings told the Wall Street Journal that Iran specifically warned Arab officials and mediators that it could strike Saudi oil facilities.[14] Director of National Intelligence Jay Clayton also recently warned that Iran is in the "advanced stages" of planning attacks against US targets in the region, referring to US assets in the Gulf countries.[15]

Gulf-based diplomatic sources told Israeli media that Saudi Arabia attempted to negotiate a ceasefire with the Houthis during a meeting with Iranian officials. Saudi Arabia would send $1 billion USD to the Houthis under the agreement, according to the sources.[16] It is unclear if the Houthis responded to the Saudi offer at the time of this writing. ISW-CTP previously observed on September 22 that the Houthis may be unwilling to accept truce offers that do not improve their long-term economic position through either control of Yemeni oil and gas or increased revenues from salary payments.[17] The Houthis are not directly responsive to Iranian direction, which suggests that Iran is acting as a mediator or interlocutor between Saudi Arabia and the Houthis, assuming that the reporting is accurate.

The Houthis likely believe that they currently hold the upper hand over Saudi Arabia, which may lead them to refrain from striking US targets in support of Iran in the event of a renewed regional conflict. Two sources familiar with US intelligence assessments told CNN on October 26 that the Houthis would likely strike US targets in the region if the US and Israel attack Iran.[18] ISW-CTP cannot independently evaluate this assessment, given that the sources did not provide any more details. ISW-CTP has not observed open-source indicators that suggest the Houthis will attack US targets in retaliation for possible future US strikes on Iran, such as explicit Houthi threats against the United States, Iranian requests for the Houthis to join a regional campaign, or military preparations to do so. It is plausible that the Houthis would be able to sustain attacks against US assets in the region, such as US military personnel in Saudi Arabia or US-linked vessels, even as the Houthis wage a campaign against Saudi Arabia and the internationally recognized government of Yemen.

The Houthis may seek to avoid attacks on US targets in support of Iran if the United States and Israel resume strikes in Iran to avoid provoking US retaliation that could weaken the group's current position relative to Saudi Arabia. The Houthis have constrained Saudi Arabia's ability to export oil and disrupted international air traffic to the kingdom through near-daily attacks on critical infrastructure, including Saudi oil export infrastructure and civilian airports.[19] The Houthis have also made significant territorial gains since September 9, including seizing territory along the Red Sea coastal plain close to the Bab al Mandeb's shipping lanes and encircling Taiz City, which is Yemen's third-largest city and a bastion of support for the Yemeni government.[20] The Houthis' rejections of other Saudi ceasefire proposals in recent months emphasize that the group believes it currently has the upper hand over Saudi Arabia.[21] The Houthis almost certainly calculate that involvement in a future regional conflict to support Iran could provoke significant retaliation that would undermine recent gains.

It is unclear whether requests from Iran would be sufficient to compel the Houthis to attack US targets if

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doing so would jeopardize their domestic position. Houthi and Iranian interests have thus far aligned as the Houthis' current campaign against Saudi Arabia and the Yemeni government advances Iran's regional campaign objectives to drive up energy prices and raise pressure on the United States.[22] The Houthis are an independent partner of Iran, rather than a proxy, however. The Houthis have historically pursued objectives for their own benefit as well as Iran's.[23] ISW-CTP assessed in early April 2026 that the Houthis did not join Iran's regional economic warfare campaign in order to avoid retaliation from the United States and its allies that might jeopardize the Houthis' domestic position, for example.[24]

Iran has reportedly continued to fund Hezbollah's reconstitution of its military forces and capabilities. Lebanese security sources told Reuters on October 26 that Hezbollah has exploited its ceasefire with Israel in June 2026 to try to reconstitute military capabilities that the Israel Defense Forces (IDF) has degraded since March 2026.[25] The sources added that Hezbollah has focused primarily on rebuilding its command-and-control structures, drone capabilities, and explosives arsenals.[26] One of the Lebanese security sources and one source close to Hezbollah stated that Iran has provided tens of millions of dollars to finance these reconstitution efforts.[27] This payment is distinct from the $200 million that Iran reportedly transferred to Hezbollah in September 2026 to pay Lebanese families impacted by the Israel-Hezbollah war.[28]

ISW-CTP has repeatedly assessed that Hezbollah will likely use the Israel-Hezbollah ceasefire in Lebanon to reconstitute its military forces and prepare for future conflict with Israel with Iranian support.[29] Lebanese military sources told Emirati media on October 15 that Iran is working to decentralize Hezbollah's command-and-control structure, an effort that Iran reportedly began in late 2024 following Israeli strikes that decapitated Hezbollah's senior leadership and imposed a state of shock upon the group.[30] Israeli media reported on October 12 that Hezbollah is also working to expand the range and payload capacity of its first-person view drones.[31] A Hezbollah official and a Lebanese security source told Reuters on October 26 that the nearly 800 kilograms of explosives that Lebanese security forces seized on October 5 were intended for Hezbollah's drone program.[32]

Current indicators suggest that Hezbollah may not participate in a renewed Iranian conflict by attacking Israel in the near term. Lebanese parliamentary sources told UK-based, Saudi-owned media on October 24 that Iranian Deputy Foreign Minister Saed Khatibzadeh recently told Hezbollah and the Hezbollah-allied Amal Movement that Iran will not ask Hezbollah to participate in a renewed regional conflict if the United States strikes Iran.[33] Khatibzadeh reportedly delivered this message during his visit to Lebanon between October 14 and 15 amid growing concerns among Iranian leaders over the possibility that United States and Israeli strikes might renew strikes on Iran after the November 3 midterm elections.[34] Hezbollah parliamentarian Hassan Fadlallah claimed that Iran has "not asked" Hezbollah to join in on the fighting in a speech on October 26.[35] Hezbollah has historically taken military and political action to support Iranian objectives in the region.[36] The Iranian regime may prefer to limit Hezbollah's involvement in such a round of conflict in order to prioritize Hezbollah's military reconstitution, given that any Hezbollah attacks on Israel would almost certainlyprovoke an Israeli response.[37]

It is possible that neither Iran nor Hezbollah view possible renewed US-Israeli strikes on Iran as an existential threat to the regime at this time. Hezbollah intervened in March 2026 by firing rockets at Israel after the United States and Israel killed then-Supreme Leader Ali Khamenei.[38] Hezbollah likely viewed the threat to the Iranian regime at the time as existential and intervened because the collapse of the regime would be a major setback for Hezbollah and its regional goals.[39] Hezbollah's lack of participation during the 12-day War in June 2025 demonstrated that Hezbollah may not always intervene on Iran's behalf if it views the threat to the regime as non-existential. The US strikes on Iran in June 2025 aimed to degrade Iran's nuclear program, not to topple the regime.[40]

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Hezbollah may also seek to avoid another bout of fighting that could erode its public support in southern Lebanon. A senior Hezbollah leader responsible for the group's border and resources department and Israeli affairs stated on October 26 that Hezbollah seeks to spare southern Lebanese civilians from further IDF attacks.[41] The Hezbollah media office similarly told Reuters on October 26 that the group is "weary of giving Israeli leaders any justification to escalate in Lebanon" and is concerned about its constituents in southern Lebanon being further displaced by IDF attacks.[42] Hezbollah's concern about exposing its constituents in southern Lebanon to further IDF attacks likely reflects the group's increasingly unpopular domestic standing since October 2023 due to its initiation of several destructive wars with Israel.[43] Hezbollah likely views recouping popular support, particularly among its Shia base, as a requirement of its political and military reconstitution.

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

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- *Restore deterrence vis-à -vis the United States and its regional partners*
- *Divide the United States and Israel from the Arab states*

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

Iran may try to expand alternative trade and transit routes through Afghanistan to mitigate the economic effects of disrupted overland trade channels through Pakistan and Iraq. Islamic Development Organization (IDO)-affiliated outlet Mehr News Agency argued in an op-ed on October 26 that Iran should expand its alternative transit routes through Afghanistan in order to strengthen Iran's access to regional markets, including by expanding routes along the Khaf-Herat railway, the proposed Herat-Mazar Sharif line, and a longer-term corridor that links Iran to Central Asia and China.[44] Mehr's op-ed comes as Iran faces growing constraints on overland trade with and through neighboring countries, likely due to US pressure.[45] Pakistan temporarily suspended trade with Iran through the Taftan and Gabd-Rimdan crossings on October 17.[46] A Pakistani Foreign Office official stated on October 23 that Pakistan closed the crossings in compliance with "all applicable sanctions regimes," which is notable given that Pakistan has historically stated that it is not obligated to comply with US sanctions.[47] Iraq separately closed the al Sheeb border crossing between Iraq's Maysan Province and Iran's Khuzestan Province on October 21.[48] ISW-CTP previously assessed that the closure of these three border crossings will likely exacerbate the effects of the economic restrictions that Iran currently faces because Iran has

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increasingly relied on overland trade routes in recent months as the United States has constrained Iran's ability to trade by sea and air.[49] Mehr News acknowledged that the proposed projects to expand trade through Afghanistan face major challenges related to financing, customs, infrastructure, and sanctions and therefore would not provide Iran with immediate economic relief.[50]

Lebanon

See topline section.

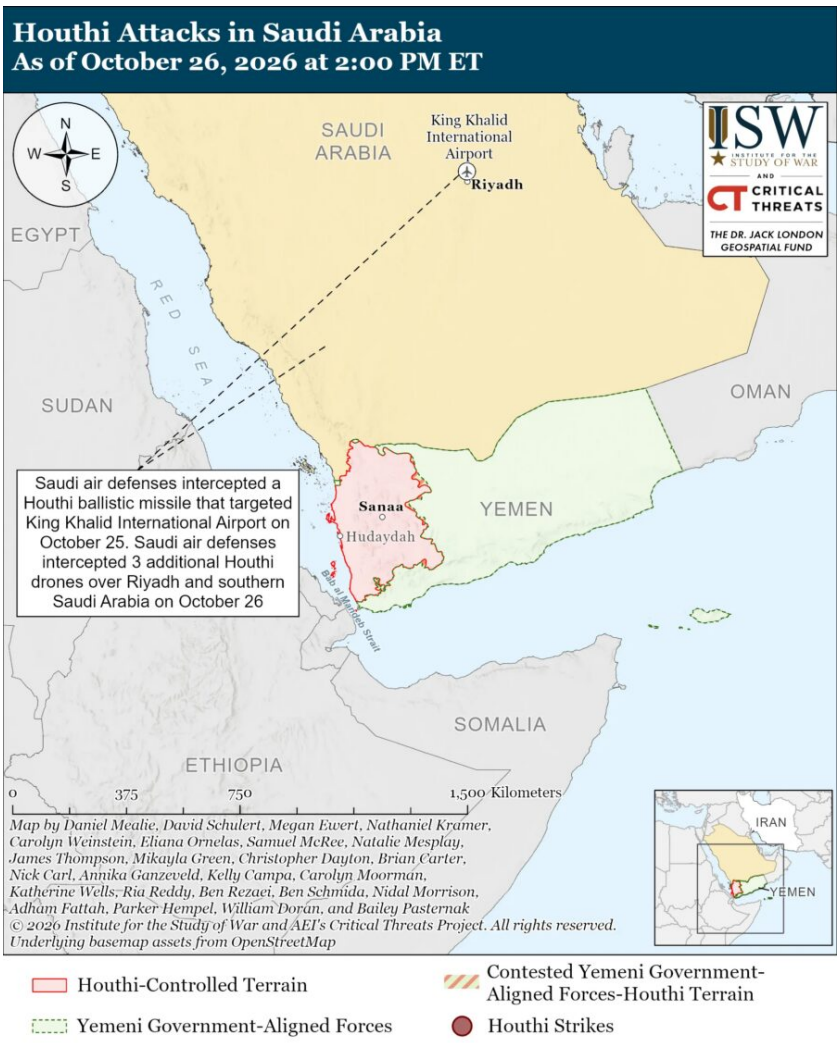
Iraq

Unspecified sources told Saudi-owned regional media on October 24 that the Iraqi federal government believes that Israel struck sites storing People's Republic of China-made man-portable air defense systems (MANPADS) at a Popular Mobilization Forces (PMF) base in Baghdad on October 17.[51] The PMF is an Iraqi security service composed of many Iranian-backed Iraqi militias that answer to Iran instead of the Iraqi prime minister.[52] The sources claimed that the attack occurred after an unspecified Iranian-backed Iraqi militia transferred the MANPADS from Iran to the PMF base.[53] Iraqi media reported an explosion at a PMF base on October 17, which the PMF blamed on an "internal malfunction."[54] Iraqi Prime Minister Ali al Zaydi ordered the formation of a committee to investigate the incident on October 17, which has yet to release its findings.[55] Israeli media appeared to confirm on October 26 that the Israeli Air Force recently struck an unspecified site storing anti-aircraft missiles to prevent militia attacks on Saudi Arabia and the Iraqi Kurdistan Region.[56] Israel previously struck Iranian-backed Iraqi militia weapons depots to prevent militia attacks on Israel in 2019.[57] Iraqi authorities initially attributed at least one of those incidents to poor storage conditions.[58] Poor storage, limited safety regulations, and high summer temperatures can occasionally cause explosions at ammunition depots in Iraq, however.[59] ISW-CTP cannot independently verify the cause of the October 17 explosion.

Arabian Peninsula

The Houthis have continued to attack critical infrastructure, including airports, across Saudi Arabia to compel Saudi Arabia to surrender to Houthi demands. The Houthis fired a ballistic missile at King Khalid International Airport in Riyadh on October 25, which Saudi air defenses intercepted after ISW-CTP's data cutoff.[60] Saudi Arabia retaliated with airstrikes on five Houthi ballistic missile storage sites and four ballistic missile launch platforms, including the missile platform that targeted King Khalid Airport, in Houthi-controlled Sanaa Governorate on October 25.[61] Saudi Joint Forces Command intercepted three additional Houthi drones near Riyadh and in southern Saudi Arabia on October 26.[62] The Houthis have conducted near-daily attacks targeting sites in and around Riyadh since October 1, including the King Khalid International Airport.[63] The Houthis seek to compel Saudi Arabia to halt military operations against the Houthis and accept the Houthis' demands, which include lifting Saudi controls on Houthi-controlled ports and airports and granting the Houthis control over Yemen's oil and gas resources.[64]

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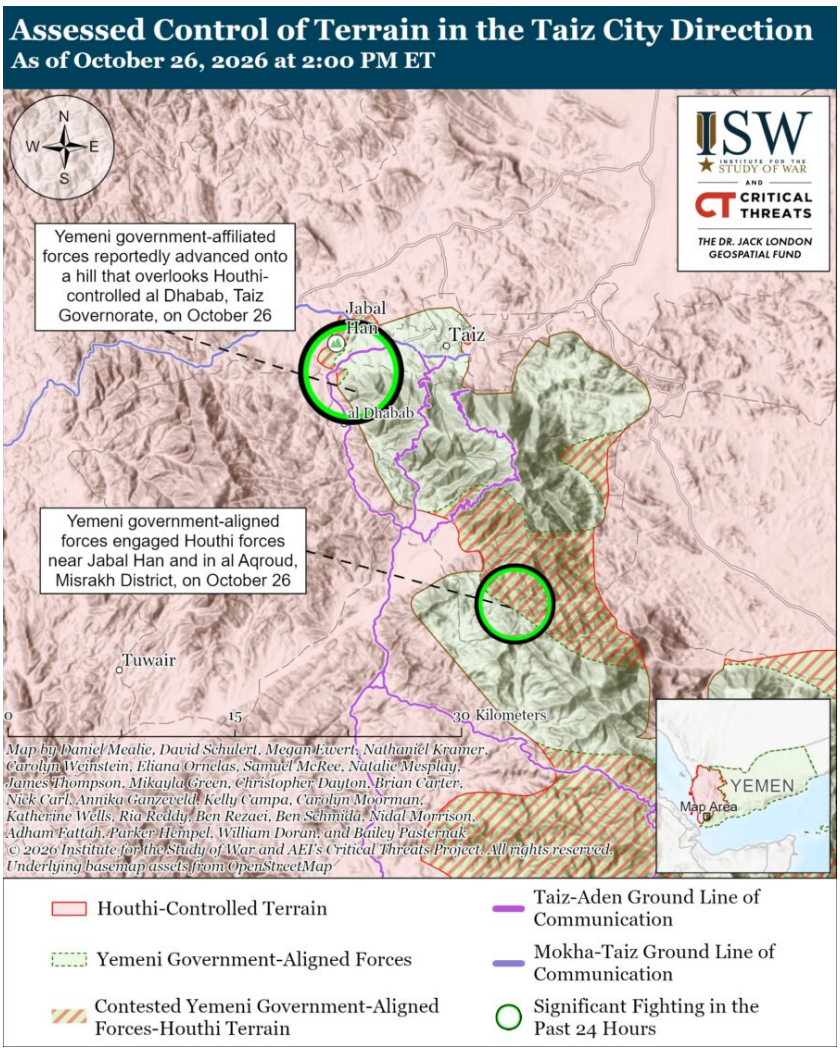


Map by Daniel Mealie, David Schulert, Megan Ewert, Nathaniel Kramer, Carolyn Weinstein, Eliana Ornelas, Samuel McRee, Natalie Mesplay, James Thompson, Mikayla Green, Christopher Dayton, Brian Carter, Nick Carl, Annika Ganzeveld, Kelly Campa, Carolyn Moorman, Katherine Wells, Ria Reddy, Ben Rezaei, Ben Schmida, Nidal Morrison, Adham Fattah, Parker Hempel, William Doran, and Bailey Pasternak
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Underlying basemap assets from OpenStreetMap

The Egyptian Parliament approved sending defensive military aid to Saudi Arabia on October 26.[65] The Egyptian Parliament's statement did not specify what type of defensive military aid Egypt would provide Saudi Arabia, but the deputy head of the Egyptian Parliament's legislative committee told Reuters on October 26 that Egypt would send forces to the kingdom.[66] Egypt's approval of defensive support comes after Egyptian President Abdel Fattah al Sisi stated on October 18 that Egypt would provide defensive military aid to Saudi Arabia if Saudi Arabia requested support.[67] Reuters added that neither side has announced a formal Saudi request for Egyptian troops, however.[68] Egypt is part of Saudi Arabia's anti-Houthi coalition and has previously supported Saudi counter-Houthi operations in Yemen, including by providing air and naval support to strike Houthi targets in Yemen in 2015.[69]

Yemeni government-aligned forces have continued to engage Houthi forces south of Taiz City in order to try to break the Houthi encirclement of the city and central Taiz Governorate. Yemeni government-aligned forces reportedly advanced southward to a hill that overlooks Houthi-controlled al Dhabab, Taiz Governorate, on October 26, according to anti-Houthi sources and Saudi media.[70] ISW-CTP cannot confirm this advance at this time. Yemeni government-aligned forces also continued to engage Houthi forces near the contested areas of Jabal Han and al Aqroud, Misrakh District, on October 26, according to anti-Houthi sources.[71] Geolocated footage posted on October 25 showed that Yemeni government-aligned forces dropped bombs on Houthi forces using drones in al Misrakh District on October 25, which indicates that the Houthis retain at least some forces in the area.[72] The Houthi encirclement of central Taiz likely continues to constrain reliable routes for Yemeni government-aligned forces to resupply and send reinforcements to Taiz City.[73]

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The Houthis targeted Yemeni government weapons depots in Aden Governorate to degrade the government's ability to sustain operations against the Houthis. The Houthis claimed that they targeted Yemeni government-aligned forces and weapons depots in Aden Governorate near Aden City, the Yemeni government's de facto capital.[74] The Houthis have repeatedly targeted Saudi weapons shipments and Yemeni government weapons depots in Aden in recent weeks.[75] The Houthis very likely targeted Yemeni government-aligned forces and weapons depots in Aden Governorate as part of the Houthis' ongoing effort to degrade the government's ability to sustain offensive and defensive operations, including potential government efforts to break the Houthi encirclement of Taiz City.[76] The Houthis may also be attempting to degrade Aden-based forces' capabilities in an effort to set conditions for any Houthi offensive in Aden City.

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Endnotes

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Iran Update, October 27, 2026

Ben Rezaei, Carolyn Moorman, William Doran, Bailey Pasternak, Parker Hempel, Katherine Wells, Brian Carter

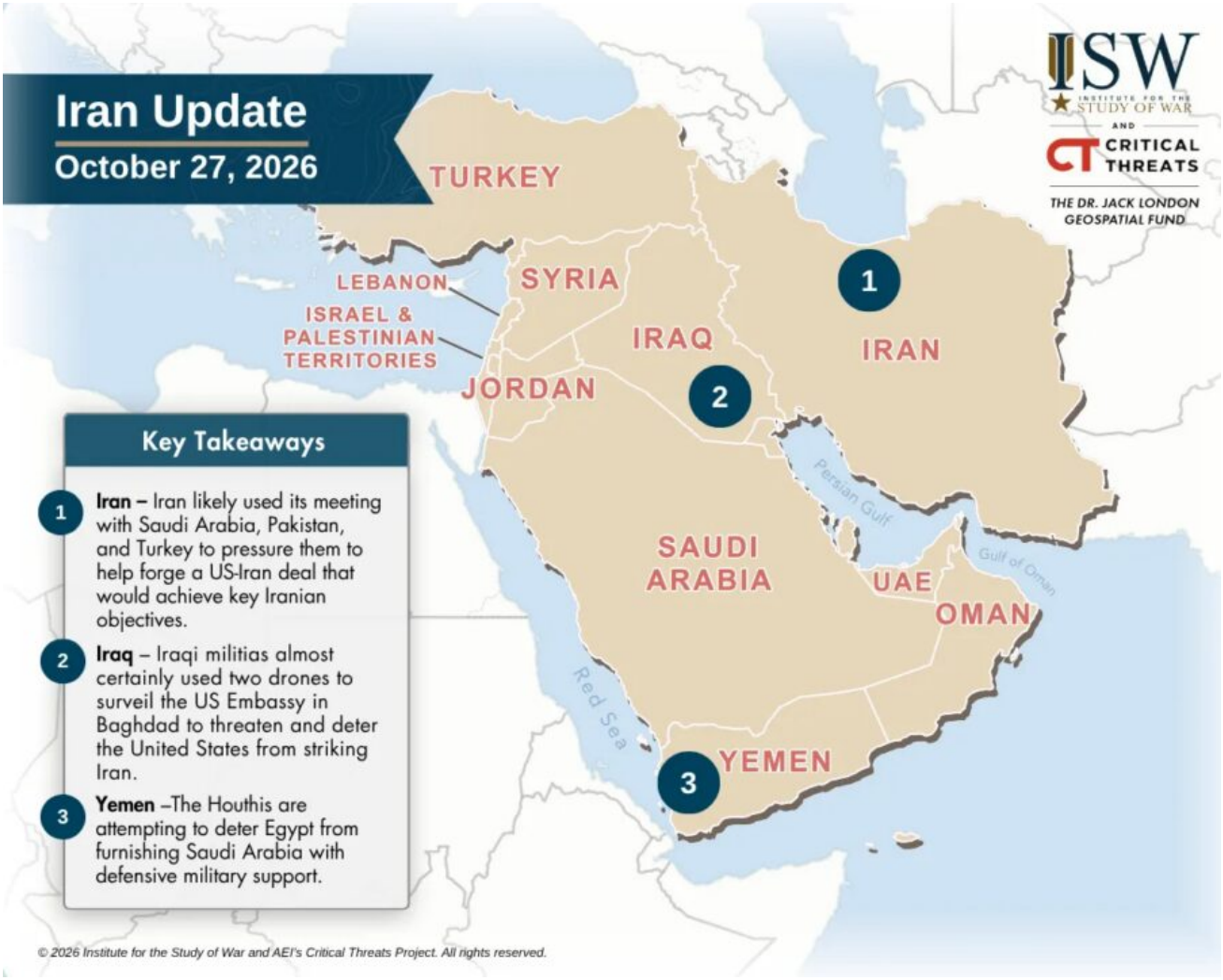
Analyst Notes: Data Cutoff: 2:00 PM ET.

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran 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. Iran likely used its meeting with Saudi Arabia, Pakistan, and Turkey to pressure the trio of countries to help forge a US-Iran deal that would achieve key Iranian objectives. Iran is presumably attempting to exploit regional concerns that renewed fighting and US-Iran tensions could embroil regional countries in the future and is aiming to portray the United States as the source of the problem.
2. Iranian-backed Iraqi militias almost certainly used two drones to surveil the US Embassy in Baghdad on October 27 in order to threaten and deter the United States from striking Iran. The militias' decision to use drones is more subtle than previous militia threats and is likely a response to the changing political situation in Iraq and Iranian preferences.
3. The Houthis are attempting to deter Egypt from furnishing Saudi Arabia with defensive military support following Egypt's parliament approval of "purely defensive" military assistance to Saudi Arabia, including Egyptian forces that will remain in Saudi territory and not assist in Saudi attacks on Houthi targets, on October 26.

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Toplines

Iran likely used its meeting with Saudi Arabia, Pakistan, and Turkey to pressure the trio of countries to help forge a US-Iran deal that would achieve key Iranian objectives. Iranian officials asked senior Saudi, Pakistani, and Turkish officials to use their close relationships with Washington to persuade the United States to accept Iran's proposed efforts to resume negotiations, according to Emirati media.[1] Iran also likely attempted to persuade the three countries to accept a regional non-aggression pact.[2] Supreme National Security Council Secretary Major General Mohsen Rezaei said that Iran sought regional arrangements without external involvement and the withdrawal of foreign — i.e., US and allied — forces.[3] Rezaei also told Houthi Ambassador to Iran Ibrahim al Dulaimi on October 27 that the recent Tehran meeting aimed to establish regional security arrangements and address foreign forces' withdrawal.[4] Expelling the United States from the region would satisfy a long-held Iranian aspiration, making it nearly impossible for the Gulf to prevent Iran from controlling the strait if Iran chose to do so. A senior Pakistani security official separately told Reuters on October 26 that the summit focused on a "regional non-aggression network" and that the Mecca Pact countries and Qatar could serve as guarantors for a future agreement.[5]

Iran is presumably attempting to exploit regional concerns that renewed fighting and US-Iran tensions could embroil regional countries in the future and is aiming to portray the United States as the source of the problem. Omani Foreign Affairs Minister Badr al Busaidi called for a Gulf non-aggression pact with Iran on October 26, but Iran is unlikely to accept such an agreement unless it can also secure a US

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withdrawal from the region.[6] Regional sources said that the summit made no progress on any issue.[7]

Iranian-backed Iraqi militias almost certainly used two drones to surveil the US Embassy in Baghdad on October 27 in order to threaten and deter the United States from striking Iran.[8] The embassy's defenses intercepted the drones.[9] A security source speaking to Iraqi media denied that the drones carried explosives.[10] Iranian-backed Iraqi militias continuously used drones to attack the US Embassy in Baghdad in March and April 2026, even using fiber-optic first-person view (FPV) drones to fly through and recon the embassy.[11] The Iraqi militias almost certainly used the surveillance drones on October 27 to threaten additional militia attacks on the embassy if the United States and Israel resume their attacks on Iran.

The use of these drones also has tactical benefits beyond the strategic effects achieved through threats and deterrence. The drones could observe possible targets, and the activation of the air defense system surely provided lessons in how that system operates. This threat comes as Director of National Intelligence Jay Clayton warned in a memo on October 23 that Iran has "substantially increased" its efforts to target US personnel.[12]

The militias' decision to use drones is more subtle than previous militia threats, which is likely a response to the changing political situation in Iraq and Iranian preferences. The Iraqi militias have traditionally publicly threatened US forces and assets to deter the United States from acting against certain Iranian interests.[13] The Iraqi militias verbally threatened the United States prior to the start of the US-Israel-Iran War in February 2026, for example.[14] The modus operandi of some of these groups has changed, however, in part driven by new Iranian preferences and in part by evolving Iraqi political dynamics. Iran has increasingly relied on smaller cells of Iraqi militia members directly managed by the Islamic Revolutionary Guards Corps to conduct attacks over the more historic Iraqi militias.[15] Iran has also reportedly pressured some of the Iraqi militias to focus on politics and Iraqi state capture over kinetic activity.[16] The withdrawal of US forces in Iraq simultaneously robbed the Iraqi militias of their nationalist veneer by tying attacks on US forces to the nationalist impulse to expel the "occupier." Public threats tie militias and their political arms to attacks on US forces, which invites US strikes against Iraq. The Iraqi public is disdainful of actions that make Iraq a battlefield for Iran and the United States historically.[17] The militias' use of different tactics also comes amid increased pressure by the United States and Iraq's neighboring countries on the Iraqi federal government to act against the militias.[18] Iraqi Prime Minister Ali al Zaydi has reacted to this pressure by attempting to curb militia operations, despite facing limitations from Iran's infiltration of Iraqi institutions and the overall strength of the militias.[19]

The Houthis are attempting to deter Egypt from furnishing Saudi Arabia with defensive military support. Egypt's parliament approved "purely defensive" military assistance to Saudi Arabia, including Egyptian forces that will remain in Saudi territory and not assist in Saudi attacks on Houthi targets, on October 26.[20] Houthi Supreme Political Council member Mohammed Ali al Houthi claimed on October 27 that Egypt has effectively "declare[d] war" on the Houthis by deciding to send military assistance to Saudi Arabia.[21] Such assistance could, in principle, support Saudi efforts to defend its territory. The Houthis understand that it is more favorable to fight only Saudi Arabia rather than a larger coalition, even if that coalition is only furnishing Saudi Arabia with defensive support.[22] Such defensive support could enable Saudi Arabia to continue fighting longer because better defenses could, in theory, translate into less successful and impactful Houthi attacks. The Houthis have similarly warned and threatened other Saudi partners, including Mecca Pact allies Pakistan and Turkey, against supporting Saudi Arabia in recent weeks in attempts to isolate the kingdom.[23]

The Houthis are also insinuating that they could attack shipping through the Suez Canal as part of this

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effort to deter Egypt and other international partners from supporting Saudi Arabia militarily.[24] Mohammed Ali al Houthi claimed that the Houthis already provide “protection” for the Suez Canal, which mirrors Houthi assertion of control over the Bab al Mandeb and illegitimate authority to dictate international maritime traffic norms.[25] The Houthis possess several drone and missile systems that could strike vessels in the Suez Canal, but these capabilities and veiled threats do not, on their own, indicate that the group is willing to disrupt maritime traffic in the canal.[26] Targeting vessels at such distance would also be extremely difficult, given the requirements to sense and track moving targets at extreme range. The Houthis have claimed that they will not attack non-Saudi vessels in the Red Sea in order to avoid provoking an international military response, akin to the US strike campaign in Yemen in 2025.[27]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Nothing significant to report.

US-Iran Negotiations

See topline section.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

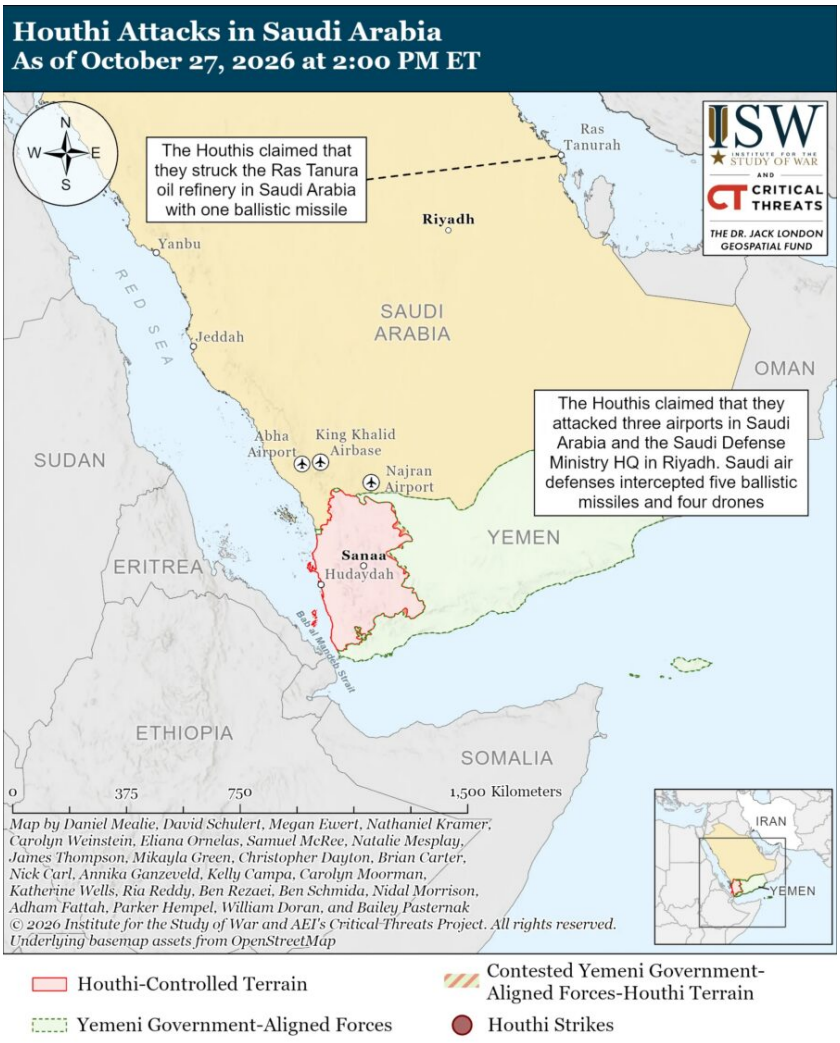
See topline section.

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Arabian Peninsula

The Houthis claimed that they struck the largest oil refinery in Saudi Arabia on October 27 as part of their campaign against Saudi Arabia. ISW-CTP cannot verify the Houthis' claim at the time of this writing, however. The Houthis claimed that they struck the Ras Tanura oil refinery in Saudi Arabia with a ballistic missile on October 27 for the first time in the 2026 fighting.[28] The Houthis have repeatedly targeted Saudi oil infrastructure to compel Saudi Arabia to concede to Houthi demands, which include lifting Saudi controls on Houthi-controlled ports and airports and granting the Houthis control over Yemen's oil and gas resources.[29] The Houthis had previously refrained from targeting Saudi Arabia's most significant oil facilities in this current conflict, including Ras Tanura, however. The Houthis may have targeted Ras Tanura to increase pressure on Saudi Arabia to compel it to concede to Houthi demands following reports that Saudi Arabia and the Houthis failed to arrive at a ceasefire agreement during negotiations in Iran on October 26.[30] An Iranian source told Emirati media on October 27 that the Houthis conditioned any ceasefire agreement on Saudi Arabia lifting its blockade of Houthi-controlled airports, which Saudi Arabia presumably rejected.[31]

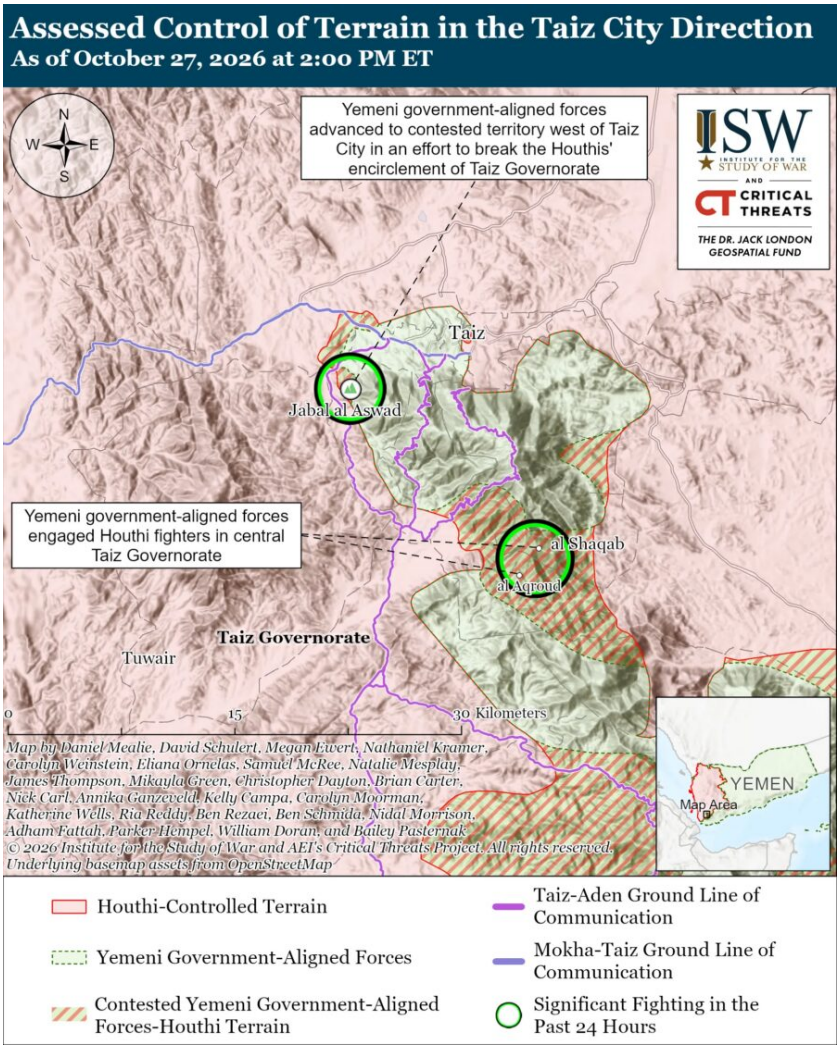
The Houthis separately claimed to have struck King Khalid Air Base, Abha International Airport, and Najran International Airport in Saudi Arabia in addition to the Saudi Defense Ministry headquarters in Riyadh on October 27.[32] The Saudi Joint Forces Command reported that Saudi air defenses intercepted five ballistic missiles and four drones over Saudi Arabia, including Riyadh, on October 27.[33]



Yemeni government-aligned forces continue to engage Houthi forces west of Taiz City in an

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effort to break the Houthi encirclement of the city and central Taiz Governorate. A Yemeni government-aligned military official separately told UK-based, Saudi-owned media on October 27 that Yemeni government-aligned forces advanced into previously Houthi-controlled mountainous terrain west of Taiz City in Sabr al Mawadim District on October 27. Geolocated footage published by the Yemeni government confirmed Yemeni government-aligned forces' presence in this area on October 27.[34] Yemeni government-aligned forces are likely attempting to advance into these areas to deny the Houthis the ability to occupy the elevated terrain that the Houthis could use to engage or direct fires at Yemeni government-aligned forces in lower terrain in Taiz City. Yemeni government-aligned forces will need to recapture and secure key segments of the Taiz-Aden ground line of communication as well as break the Houthis' encirclement to restore reliable routes for resupply and reinforcements to Taiz City, however.[35]



Map by Daniel Mealie, David Schulert, Megan Eiwert, Nathaniel Kramer, Carolyn Weinstein, Eliana Ornelas, Samuel McRee, Natalie Mesplay, James Thompson, Mikayla Green, Christopher Dayton, Brian Carter, Nick Carl, Annika Ganzeveld, Kelly Campa, Carolyn Moorman, Katherine Wells, Ria Reddy, Ben Rezaei, Ben Schmida, Nidal Morrison, Adham Fattah, Parker Hempel, William Doran, and Bailey Pasternak
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Underlying basemap assets from OpenStreetMap

Yemeni government-aligned forces are continuing to engage Houthi fighters on the southern edge of the Red Sea coastal plain, including areas along the Bab al Mandeb Strait. The Yemeni government-aligned Homeland Shield Forces and Southern Giants Brigades recaptured hilltops and surrounding territory overlooking the Bab al Mandeb Strait near al Ghurayrah, according to geolocated footage posted on October 27.[36] Yemeni government sources told UAE-based international media on October 27 that Yemeni government-aligned forces have launched an offensive to recapture territory along the Bab al Mandeb with Saudi close air support.[37] ISW-CTP has not observed significant offensive efforts by Yemeni government-aligned forces near the Bab al Mandeb or on the southern Red Sea coastal plain, although Yemeni government-aligned forces continue to engage Houthi fighters in the vicinity. An independent Yemeni journalist reported that the Houthis briefly captured parts of Jabal Kahbub, which is

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a low mountain range that overlooks the coastal plain's southeastern edge, before Yemeni government-aligned forces reversed most of these gains on October 27.[38] Jabal Kahbub's position and elevation are advantageous for spotting and firing on enemy forces on the southern coastal plain. Government-aligned forces' control over this mountain range protects other government-aligned forces on the plain.[39]

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Iran Update, October 28, 2026

Bailey Pasternak, Katherine Wells, Adham Fattah, William Doran, Kelly Campa

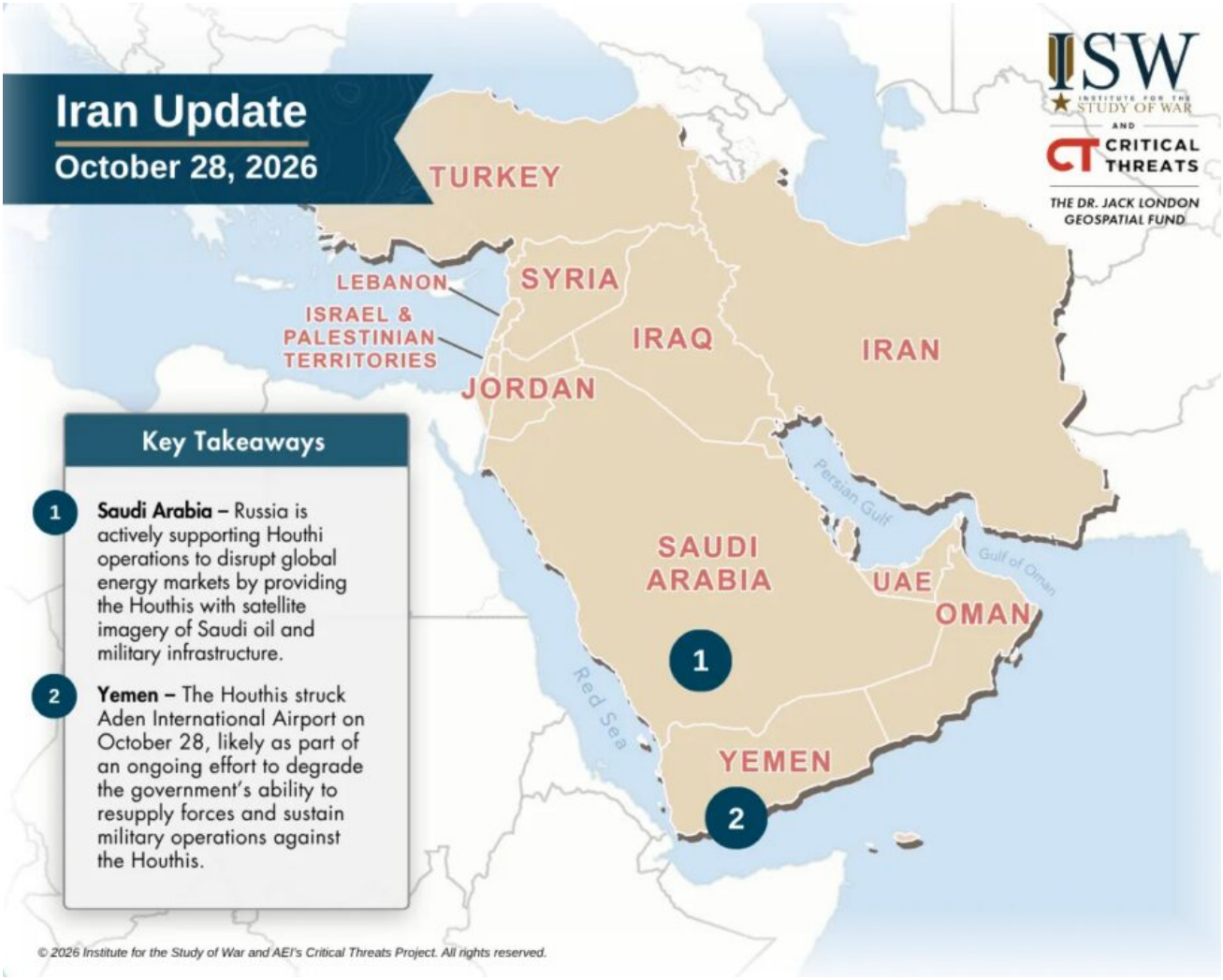
Analyst Notes: Data Cutoff: 2:00 PM ET

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. Russia is actively supporting Houthi operations to disrupt global energy markets by providing the Houthis with satellite imagery of Saudi oil and military infrastructure. Russian satellites have routinely been positioned above major Saudi energy and military sites in the days prior to and after Houthi attacks on those sites since July 2026.
2. The Houthis struck Aden International Airport on October 28, likely as part of an ongoing effort to degrade the government's ability to sustain military operations against the Houthis. The Houthis have repeatedly attacked Aden International Airport in recent weeks in order to disrupt weapons shipments to Yemeni government-aligned forces via the airport.

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Toplines

Russia is actively supporting Houthi operations to disrupt global energy markets by providing the Houthis with satellite imagery of Saudi oil and military infrastructure. A Switzerland-based geospatial intelligence firm told the Associated Press on October 28 that it has consistently observed Russian military satellites positioned above major Saudi energy and military sites in the days prior to and following Houthi drone and missile strikes on Saudi Arabia.[1] Russian satellite activity followed a similar pattern around attacks on Saudi infrastructure originating from Iraq, where the Houthis maintain a presence and have launched attacks on Saudi Arabia with Iraqi militias. A Saudi official and a high-ranking Houthi official separately told the Associated Press that Russia is providing satellite-based targeting intelligence to the Houthis, reportedly through Iranian military advisers who are operating in Yemen.[2] Russian pre- and post-strike imagery very likely enables the Houthis and Iranian military advisers to conduct battle damage assessments of their strikes.[3] The geospatial intelligence firm observed 40 instances of Russian satellite positioning over Saudi military and energy sites between July 1 and October 19, including the September 10 drone strike on the Saudi East-West Pipeline.[4] Russian support is enabling the Iranian-supported Houthi campaign to constrain Saudi Arabia's ability to export oil during a global energy crisis that Iran has caused by attacking ships in the Strait of Hormuz.[5]

Russian support for Houthi efforts to disrupt Saudi energy exports is consistent with long-standing Russian support for Iran and its regional partners, particularly the Houthis. Russia previously provided the Houthis with satellite-based targeting intelligence to help the group attack US vessels and international

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shipping in the Red Sea and Gulf of Aden in 2023 and 2024, for example.[6] The Houthis supported Russia in turn by promising to not target Russian vessels in the Red Sea and by recruiting Yemenis to fight for Russia in Ukraine.[7] Russia has also provided targeting intelligence to support Iranian strikes on Saudi Arabia and other regional targets during this current conflict, according to unspecified sources speaking to the Associated Press.[8] Russian intelligence sharing with Iran and its partners in this war demonstrates how Russia is directly supporting Iranian and Iranian-backed efforts to disrupt global energy markets and raise the cost of oil.[9]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Nothing significant to report.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

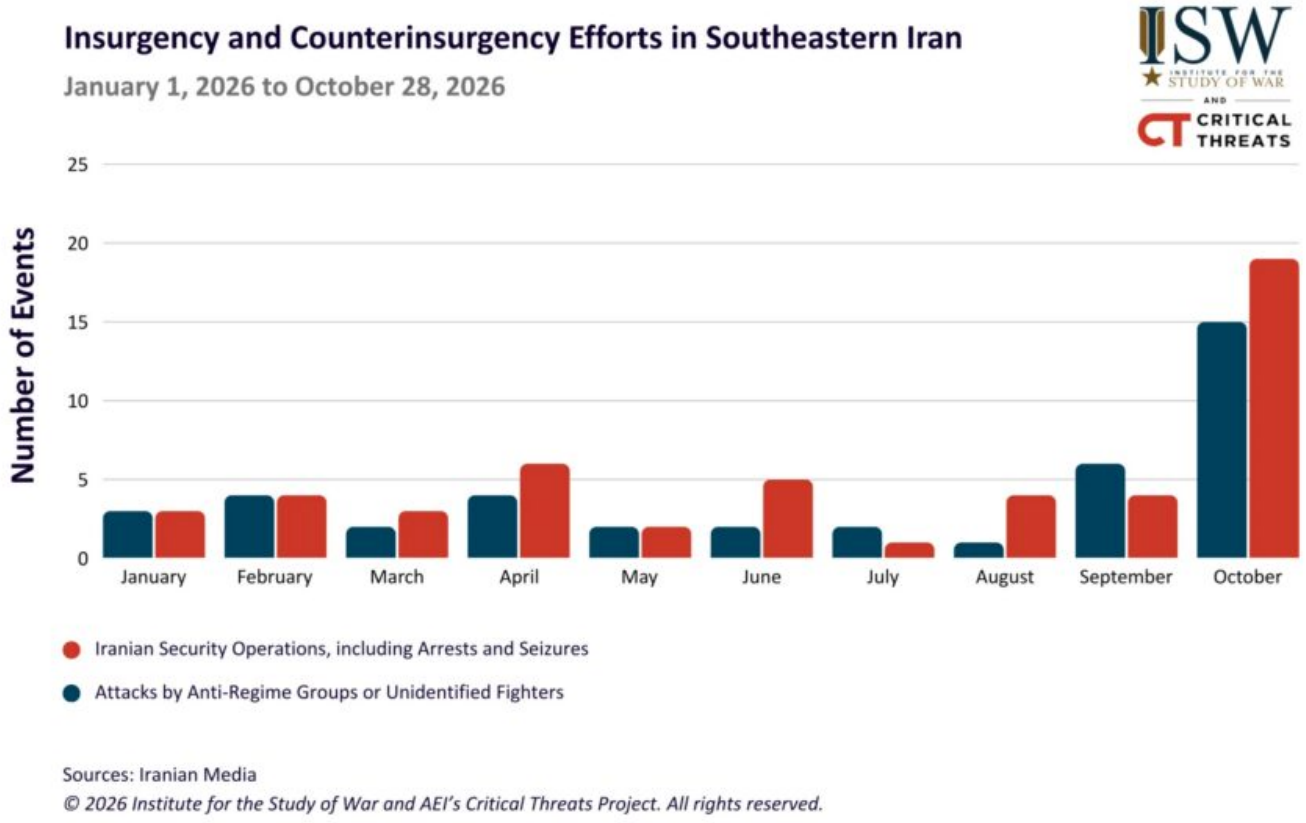
The Mobarizoun Popular Front (MPF), which is a coalition of Baloch anti-Iranian regime groups, recently established a temporary mobile checkpoint to more aggressively target regime security personnel and undermine regime authority in Sistan and Baluchistan Province. MPF published footage that showed about five fighters stopping cars and taking their information at an unspecified location on the Khash-Saravan road on October 25.[10] Several of the fighters were armed, including one with a rocket-propelled grenade. The MPF claimed that its fighters "controlled" the main transit route for "a few hours with the aim of trying to arrest" regime security personnel.[11]The MPF established a similar temporary checkpoint on the Sarbaz–Rask road in Sistan and Baluchistan Province in January 2026.[12] The MPF's ability to establish such "checkpoints" openly in broad daylight suggests that the group assessed that security forces would be unlikely to disrupt such activities in this area, either due to a lack of capability or unwillingness.

The MPF published the footage of the operation on their Telegram account, likely to generate fear among regime officials and affiliates and create the conditions to deter civilians from working with the Iranian regime in Sistan and Baluchistan Province.[13] MPF operations targeting regime security personnel can generate fear among the populace that working with the regime, or even cooperating with it, will make such civilians targets. Regime security forces presumably rely on local informants for information on MPF

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fighters' activities and locations, and MPF checkpoints could be part of a larger effort intended to, over time, discourage residents in these areas in southeastern Iran from cooperating with the government in order to hinder regime counterinsurgency efforts and set conditions for the group to expand its base and operations. The MPF may also simultaneously be attempting to increase the group's public visibility in order to recruit more fighters.

Iranian security forces continue to conduct counterterrorism operations in Sistan and Baluchistan Province to arrest cells of likely MPF or MPF-affiliated anti-regime fighters. Iranian forces most recently arrested an unspecified number of fighters in Saravan and Iranshahr on October 27.[14] It remains unclear if any of the fighters arrested in Saravan were involved in establishing the Khash-Saravan checkpoint on October 25. ISW-CTP has recorded 15 MPF attacks against regime security personnel in October 2026 (see graph below).



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Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

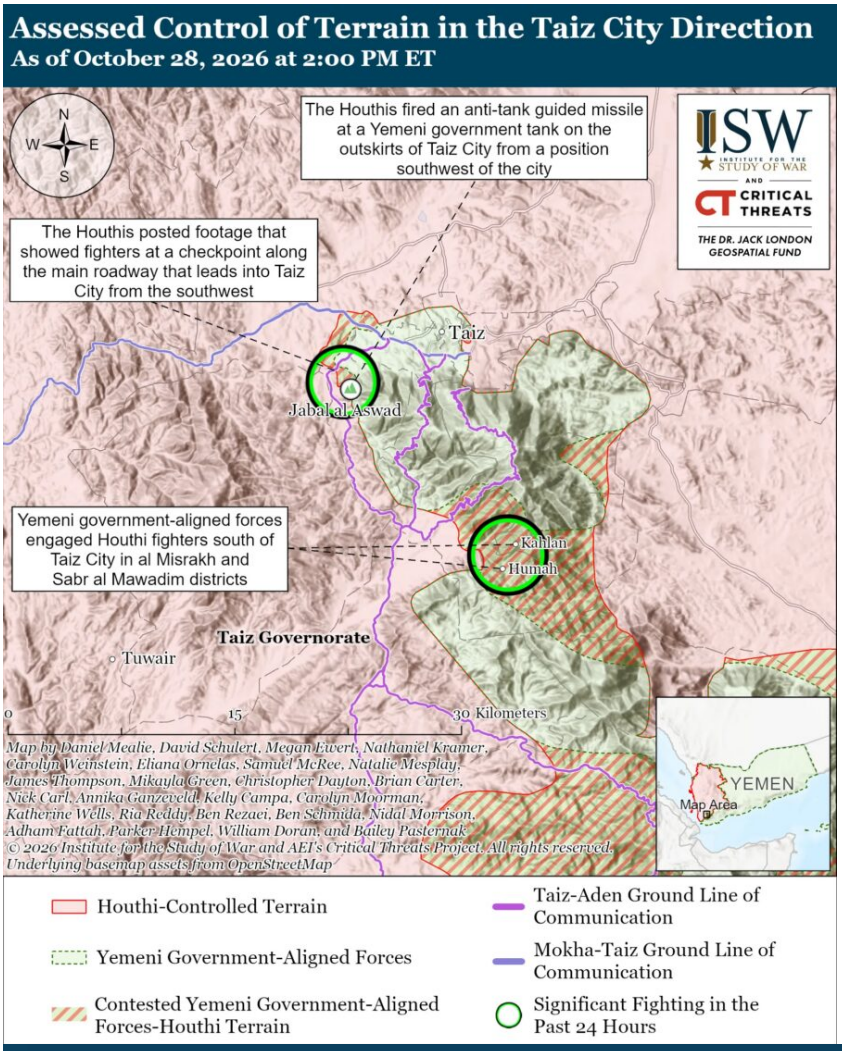
Arabian Peninsula

The Houthis struck Aden International Airport on October 28, likely as part of an ongoing effort to degrade the government's ability to sustain military operations against the Houthis.[15] The Houthis struck Aden International Airport on October 28 with at least two ballistic missiles after issuing a warning on social media to evacuate the airport.[16] The Houthis have repeatedly attacked Aden International Airport in recent weeks in order to disrupt Saudi weapons shipments to a Yemeni government military base that is co-located at the airport.[17] The Houthis may also be targeting the airport in an effort to deter future weapons shipments to Aden and prevent Saudi partners from supporting operations against the Houthis. Pakistan reportedly delivered military aid to Yemeni government-aligned forces at Aden International Airport in September, for example.[18] The Houthis may

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calculate that a higher risk to Saudi and partner forces' personnel and equipment at Aden International Airport would deter these forces from resupplying Yemeni government-aligned forces in Aden.

Yemeni government-aligned forces continued to engage Houthi fighters positioned south and southwest of Taiz City on October 28. Geolocated footage published bythe Houthis shows the Houthis firing an anti-tank guided missile at a Yemeni government tank on the outskirts of Taiz City from mountainous terrain southwest of the city.[19] The footage also showed Houthi fighters operating at the Hangar Checkpoint, which lies on a main roadway leading into Taiz City from the southwest.[20] Yemeni government-aligned forces separately announced that they repelled Houthi attacks south of Taiz City in al Misrakh and Sabr al Mawadim districts on October 28.[21]



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Iran Update, October 29, 2026

William Doran, Ben Rezaei, Carolyn Moorman, Brian Carter

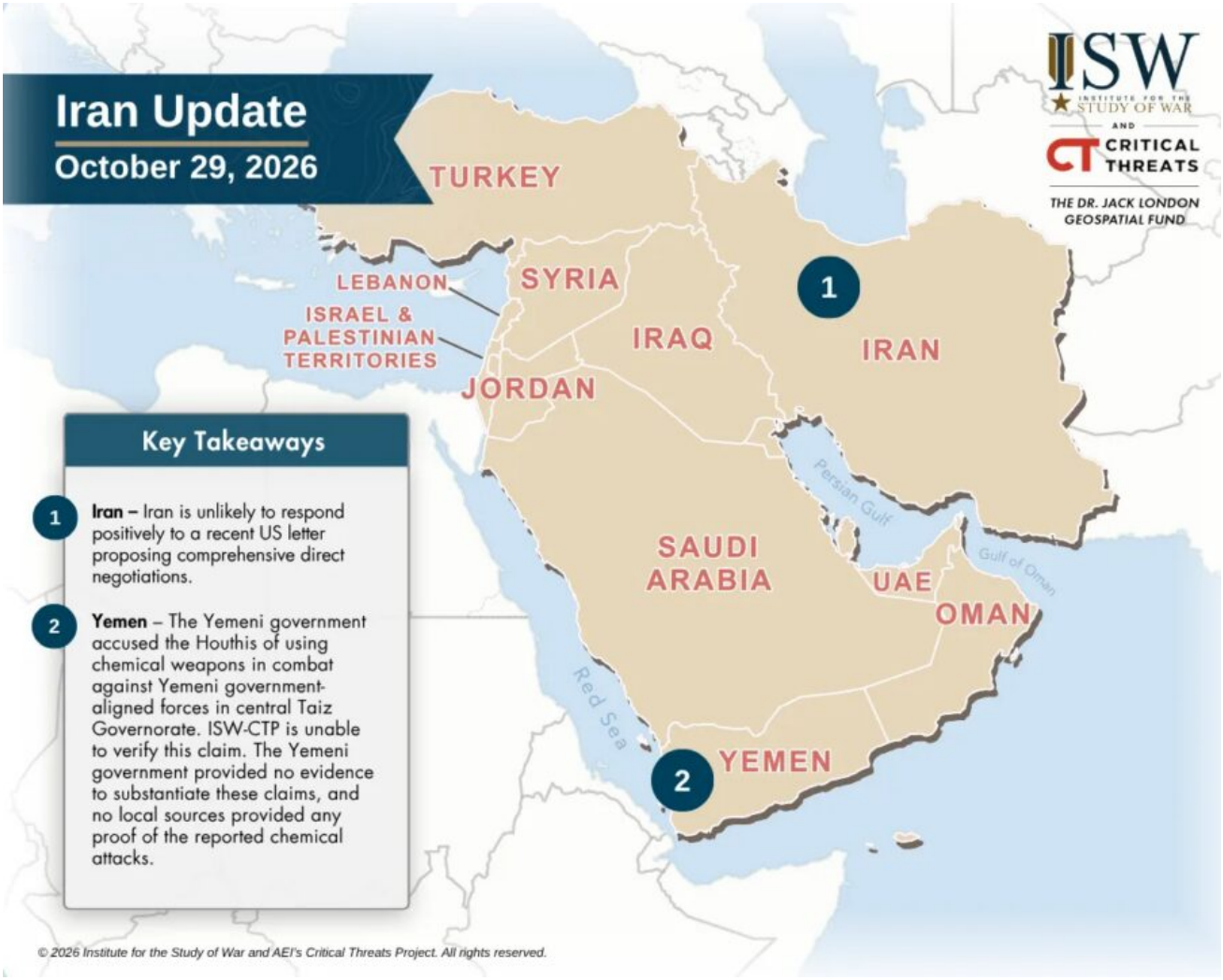
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Key Takeaways

1. Iran is unlikely to respond positively to a recent US letter proposing comprehensive direct negotiations. A senior US official and an Iranian official told the *New York Times* on October 28 that US Vice President JD Vance sent Supreme National Security Council (SNSC) Secretary Major General Mohsen Rezaei a letter through Qatari mediators that proposed comprehensive direct negotiations. Rezaei recently reiterated hardline negotiating positions, which were demands that the United States end the war on all fronts, release frozen assets, and lift the naval blockade before negotiations over anything else resume. These views are consistent with official Iranian state positions.
2. The Yemeni government accused the Houthis of using chemical weapons in combat against Yemeni government-aligned forces in central Taiz Governorate on October 28. The Yemeni government provided no evidence to substantiate these claims, and no local sources provided any proof of the reported chemical attacks. The seriousness of these claims nonetheless requires reporting, and ISW-CTP will continue to monitor the Yemeni news and social media space for indications that chemical attacks occurred.
3. Iraqi Prime Minister Ali al Zaydi is continuing his attempts to balance between the United States and Iranian-backed Iraqi actors. Zaydi's efforts to balance competing pressures also support his aims of increasing his personal power as prime minister.

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Toplines

Iran is unlikely to respond positively to a recent US letter proposing comprehensive direct negotiations. A senior US official and an Iranian official told the *New York Times* on October 28 that US Vice President JD Vance sent Supreme National Security Council (SNSC) Secretary Major General Mohsen Rezaei a letter through Qatari mediators that proposed comprehensive direct negotiations.[1] An unspecified US official added that US officials reportedly addressed the letter to Rezaei because the United States assessed that he could influence Islamic Revolutionary Guards Corps (IRGC) officials and hardliners who oppose an agreement with the United States.[2] It is unclear how the United States reached this assessment. Rezaei recently reiterated hardline negotiating positions, which were demands that the United States end the war on all fronts, release frozen assets, and lift the naval blockade before negotiations over anything else resume.[3] The SNSC is Iran's highest national security and foreign policy decision-making body.[4] Supreme Leader Mojtaba Khamenei appointed Rezaei — his former senior military adviser and a former IRGC commander — as SNSC secretary on August 9, which may have strengthened Mojtaba's control over the SNSC and reinforced the regime's hardline orientation.[5] The officials also told the *New York Times* that Vance stated in the letter to Rezaei that negotiations must address Iran's nuclear program from the outset, which is antithetical to Rezaei's stated positions on negotiations. Rezaei's views are consistent with the Iranian official view, which demands that the United States first implement Iran's conditions, including lifting the US naval blockade, releasing Iranian frozen assets, and recognizing Iran's claimed authority over the Strait of Hormuz.[6] IRGC-affiliated Tasnim News Agency reported on October 29 that Iran had not yet responded to the letter and still considers any

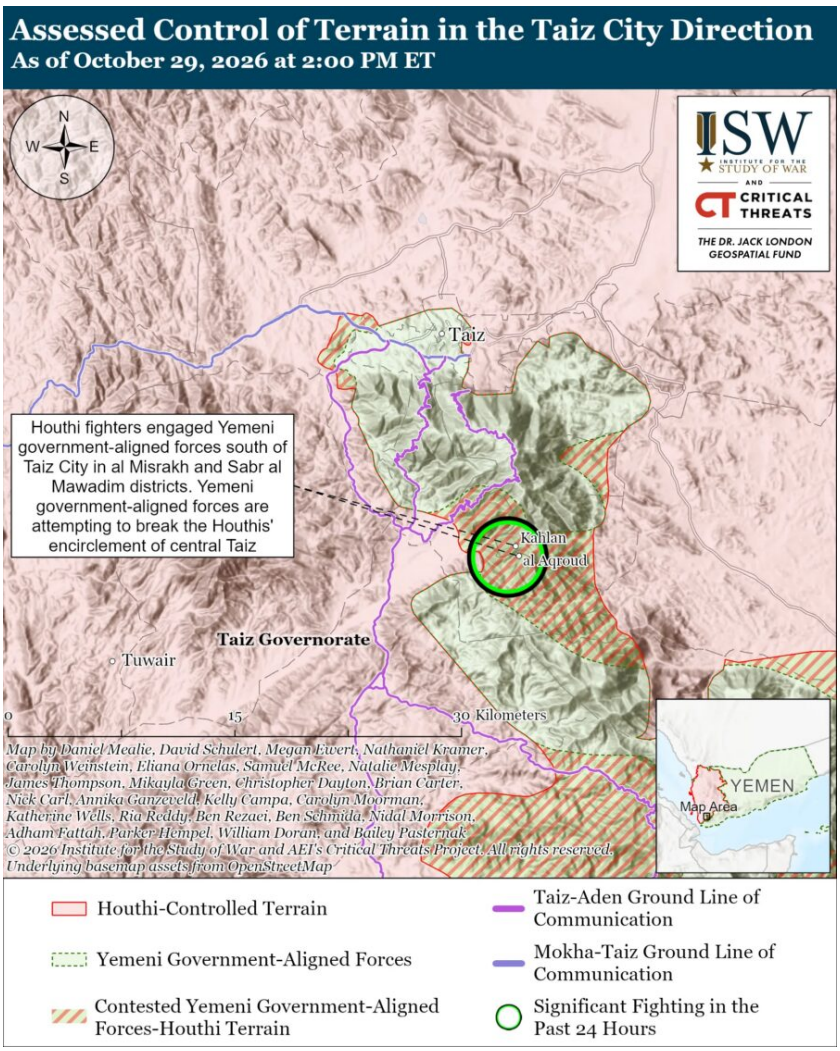
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departure from its seven conditions “unacceptable.”[7]

The Yemeni government accused the Houthis of using chemical weapons in combat against Yemeni government-aligned forces in central Taiz Governorate on October 28.[8] The Yemeni government provided no evidence to substantiate these claims, and no local sources provided any proof of the reported chemical attacks. The seriousness of these claims nonetheless requires reporting, and ISW-CTP will continue to monitor the Yemeni news and social media space for indications that chemical attacks occurred. The Yemeni government’s Media Office in Taiz Governorate cited combat reports that the Houthis fired artillery shells that may have contained “internationally banned toxic substances” while engaging Yemeni government-aligned forces near Kahlan, Sabr al Mawadim District, and al Aqroud, al Misrakh District, both in central Taiz Governorate.[9] The Houthis have repeatedly failed to consolidate control over these combat areas in recent days amid Yemeni government-aligned forces’ efforts to recapture nearby territory and break the Houthis’ encirclement of central Taiz Governorate.[10] The media office also claimed that local civilians, including pro-government local resistance forces, experienced respiratory complications and loss of consciousness in “previous incidents” but did not provide further detail.[11] Respiratory effects from a chemical attack would suggest that the Houthis used tear gas, chlorine gas, or a similar typically non-lethal chemical compound, but that the chemical was present in sufficient concentration to cause unconsciousness.[12]

Yemeni government officials, including Information Minister Muammar Eryani, have previously accused the Houthis of procuring materials for a chemical warfare program and manufacturing chemical weapons.[13] ISW-CTP cannot verify the veracity of these claims, however. ISW-CTP has also not observed any reports of Houthi chemical weapons use in other major combat areas, such as Taiz City or the Red Sea coastal plain.

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Iraqi Prime Minister Ali al Zaydi is continuing his attempts to balance between the United States and Iranian-backed Iraqi actors. Unspecified Iranian-backed Iraqi militias have reached an "understanding" with Zaydi to disarm in exchange for "key" government positions, according to sources speaking to Iraqi media on October 29.[14] The sources said that Zaydi would soon appoint a militia-linked figure as the secretary-general of the Council of Ministers, a position that a figure aligned with Shia nationalist cleric Muqtada al Sadr has held for more than two administrations.[15] ISW-CTP similarly assessed that the federal government agreed to grant three Iraqi militias control over some government ministries on October 15 to both incentivize the militias that have agreed to disarm to fully comply while motivating militias that have refused to disarm to agree to the government's still unreleased disarmament plan.[16] The Shia Coordination Framework approved some details of this plan, which aims to disarm the militias by June 2027, in late September.[17] It is unclear if the militias that reached an "understanding" with Zaydi will actually fully comply with disarmament, given the amount of room the framework's agreement leaves for militia exploitation, per the plan's publicly available details. ISW-CTP has outlined militia attempts to avoid disarmament in an October 28 special report: Iranian-backed Iraqi Militias Undermine Disarmament Efforts. The United States has continuously rejected militia-affiliated individuals serving in high-level positions within the Iraqi federal government.[18]

Zaydi's efforts to balance competing pressures also support his aims of increasing his personal power as prime minister. An unspecified framework leader told Iraqi media on October 28 that Zaydi is making changes to his administration independent of the framework.[19] Zaydi replaced the director of his office, who was a member of the former prime minister's party, with a technocrat who had been on an Iraqi government committee that designated the Houthis and Hezbollah as terrorist

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organizations in 2025 and froze their assets.[20] The federal government quickly backtracked on the decision to designate the Houthis and Hezbollah, reportedly due to pressure from Iranian-backed actors.[21] Zaydi's appointment of an individual affiliated with an Iraqi federal government decision that broadly supports US efforts to counter Iran's Axis of Resistance could be an attempt by Zaydi to counter these militia appointments. This appointment could also be in line with Zaydi's attempt to replace government officials affiliated with his predecessor. The framework leader said that Zaydi is to fire 69 advisors associated with Sudani.[22] The framework leader also criticized Zaydi's independent negotiations with the militias for undermining the framework's own negotiations.[23] Zaydi has reportedly called the framework negotiating with the militias "biased," in that the framework includes militia members and other Iranian-backed actors.[24] Zaydi pursuing his own negotiations reflects his desire to make decisions independent of the framework but could also support US aims for the development of a sovereign and independent Iraq.

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

See topline section.

Lebanon

Nothing significant to report.

Iraq

See topline section.

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Arabian Peninsula

Saudi and Yemeni government-aligned forces are likely attempting to disrupt Houthi maritime sustainment and resupply efforts on the Red Sea coastal plain by targeting Houthi-controlled ports and vessels. Houthi and Yemeni government-aligned media reported on October 28 and 29 that Saudi or Yemeni government-aligned forces conducted several rounds of airstrikes targeting Houthi positions in Mokha and Dhubab — both on the Red Sea coast.[25] Houthi media reported that at least some of the strikes targeted the port of Mokha on October 28.[26] Yemeni government-aligned media previously reported on October 28 that strikes by Saudi or Yemeni government-aligned forces destroyed two Houthi vessels in the southern Red Sea that were likely transporting weapons from the primary Houthi port in Hudaydah to other Houthi positions near Mokha, Dhubab, or along the Red Sea Coast.[27] These reported strikes on Houthi-controlled ports and vessels are consistent with ISW-CTP's assessment that Saudi Arabia and the Yemeni government intend to weaken Houthi forces that are engaged in frontline combat by disrupting the group's sustainment and logistics efforts.[28] Saudi and Yemeni government-aligned forces have struck various logistical targets, including Houthi weapons depots, food storehouses, and reinforcement convoys, in recent weeks in pursuit of this objective.[29]

Reported Saudi or Yemeni government airstrikes on Houthi vessels carrying weapons transiting the southern Red Sea indicate that these forces are still capable of threatening Houthi smuggling and maritime capabilities in the Red Sea to a limited extent following their substantial territorial losses in September 2026.[30] ISW-CTP previously assessed during the Houthi Red Sea coastal plain offensive on September 10 that the Houthis' capture of Mokha and all remaining Red Sea ports would inhibit the Yemeni government's ability to interdict Houthi smuggling vessels.[31] Yemeni government-aligned forces have recaptured some territory on the southern Red Sea coastal plain since September 10, including areas near the Bab al Mandeb Strait, but do not control a port from which to dispatch naval counter-smuggling and reconnaissance patrols in the Red Sea.[32]

These reports also suggest that the Houthis are using sea lines of communication (SLOCs) in the southern Red Sea to resupply and equip front-line forces on the coastal plain and near the Bab al Mandeb. The Houthis are likely transporting munitions along a SLOC from Hudaydah to Mokha or Dhubab because major Houthi ground lines of communication (GLOCs) between Hudaydah and Dhubab are highly exposed to Saudi and Yemeni government airstrikes. Saudi and Yemeni government-aligned forces have conducted battlefield air interdiction along the coast since the offensive began.[33]



Endnotes

[1] https://www.nytimes.com/2026/10/28/us/politics/vance-peace-talks-letter-iran.html
[2] https://www.nytimes.com/2026/10/28/us/politics/vance-peace-talks-letter-iran.html
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Iran Update, October 30, 2026

Ben Rezaei, Katherine Wells, William Doran, Nidal Morrison, Benjamin Schmida, Kelly Campa

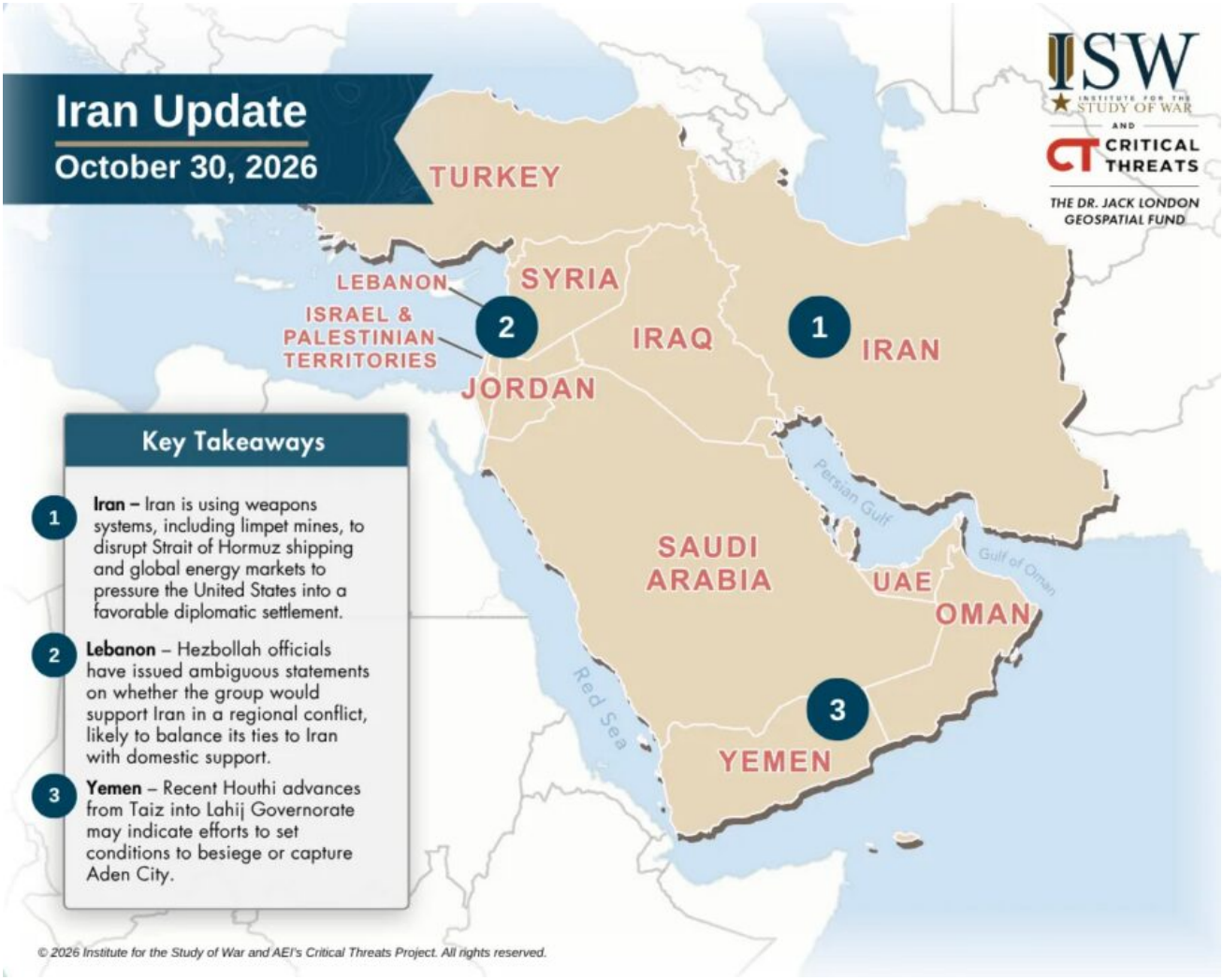
Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran 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. Iran is deploying various weapons systems, including limpet mines, to attempt to disrupt shipping in the Strait of Hormuz in order to pressure the United States into a diplomatic settlement that favors Iran.
2. A recent Reuters investigation details Iranian techniques for evading sanctions and other controls on the regime to build or reconstitute its military forces from January 2025 through June 2026.
3. Iran also imported materials to support missile production after the 12-Day War to support its priority of rebuilding its degraded ballistic missile production capabilities.
4. Iran has used its military procurement network during the current war to acquire equipment that could sustain its missile and drone production and affect global energy markets.
5. Hezbollah officials have issued ambiguous statements about whether the group would support Iran in a regional conflict, likely to balance its ties to Iran with the need to preserve domestic support.
6. Recent Houthi attempts to advance southeastward from Taiz Governorate into Lahij Governorate may indicate that the Houthis are attempting to set conditions to besiege or capture Aden City.

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Toplines

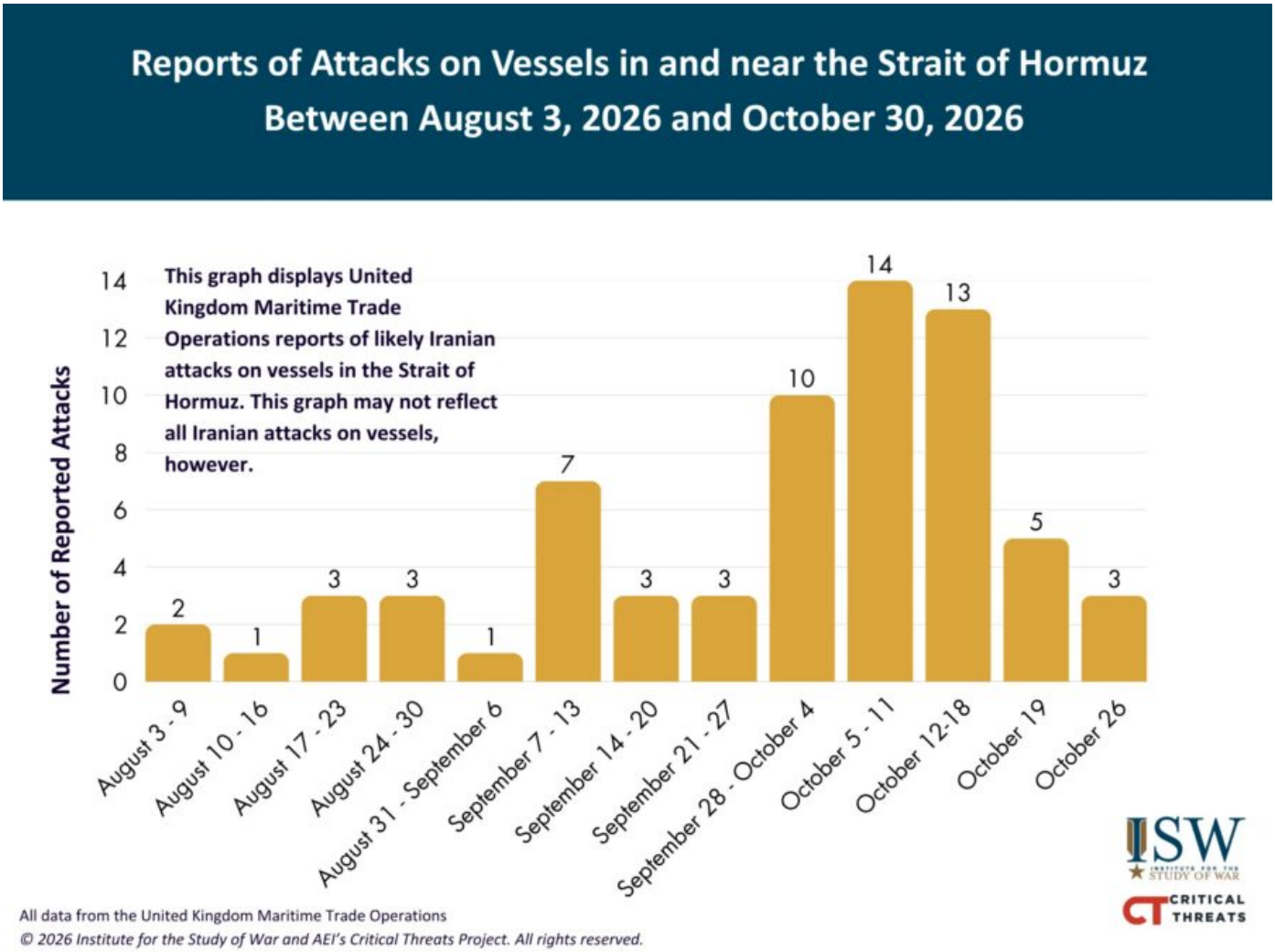
Iran is deploying various weapons systems, including limpet mines, to attempt to disrupt shipping in the Strait of Hormuz and disrupt global energy markets in order to pressure the United States into a diplomatic settlement that favors Iran.[1] Iranian forces used fast attack craft (FAC) to place and detonate two limpet mines on the hull of Panama-flagged oil tanker *Louise 1* on October 29.[2] The vessel was transiting outbound from the strait about 25 nautical miles northeast of Khasab, Oman.[3] The damage from the mines caused a fire in the vessel's engine room. This incident marks Iran's first successful detonation of a limpet mine to target a vessel in this conflict, according to two maritime sources.[4] Iran previously attempted to attach limpet mines to a vessel in September 2026 but failed to detonate the mines.[5] Iran previously deployed limpet mines against vessels in the strait in 2017 and 2019.[6]

Iran intensified attacks on civilian shipping in the Strait of Hormuz in early October 2026 to disrupt shipping and drive up oil prices in response to recent US successes in facilitating the flow of oil through the strait. The rise of oil exports out of the strait undermines Iranian claims of control over the waterway and reduces the Iranian regime's leverage to achieve Iranian war aims. Iran likely launched its recent waves of attacks on civilian ships in an attempt to change these conditions in Iran's favor. ISW-CTP assessed on October 21 that Iran may be using more accurate systems, such as weapons systems with infrared terminal guidance, to attack some of these ships.[7] Iran continues to claim that targeted vessels are hitting conventional sea mines in the strait, likely as part of an informational effort to intimidate

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shipping companies.[8] US Central Command (CENTCOM) Commander Admiral Brad Cooper stated on October 30 that CENTCOM has cleared all the mines that Iran laid in the strait at the start of the conflict, however.[9]

Vessels are still transiting the strait with the help of US naval escorts despite Iran's efforts to disrupt shipping, however.Cooper announced on October 30 that his forces have escorted over 3,000 commercial vessels through the strait and have facilitated the transit of approximately 1.5 billion barrels of oil since this summer.[10] US officials also told the *Wall Street Journal* on October 29 that 95 percent of traffic in the strait has transited safely.[11]



A recent Reuters investigation details Iranian techniques for evading sanctions and other controls on the regime's ability to build or reconstitute its military forces from January 2025 to June 2026.[12] Reuters' investigation examines three distinct periods: the six months leading up to the June 2025 12-Day War, the eight months between the June 2025 war and the 2026 US-Israel-Iran War, and the first four months of the 2026 war.[13] Iran uses a network of Iranian Ministry of Defense and Armed Forces Logistics (MODAFL)-linked entities and several sanctions-evasion methods to procure military equipment and dual-use goods despite existing sanctions.[14] Reuters reported that more than 5,000 MODAFL-linked entities rely on frontmen, foreign shell companies, and illicit oil revenue to procure goods without using cross-border currency transfers.[15] Such methods likely enable Iran to obscure military end users and hinder efforts to disrupt or dismantle Iran's procurement network. Iran also transports goods by sea, land, and air, which allows it to change suppliers, payment methods, and transportation routes when sanctions or military operations disrupt individual channels.[16]

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Iran likely attempted to reconstitute capabilities degraded in recent Israeli strikes and bolster existing equipment stockpiles leading up to the June 2025 12-Day War.[17] Iran likely sought to rebuild its intermediate-range, solid-fuel ballistic missile stocks after Israel damaged key production sites in October 2024.[18] Reuters reported that MODAFL-linked entity MOD 346428 imported 886 tons of Chinese chemicals under a customs category that includes sodium chlorates and other perchlorates between January and April 2025.[19] Iran can convert sodium perchlorate into ammonium perchlorate, which comprises approximately 70 percent of solid-fuel missile propellant.[20] People's Republic of China (PRC)-based entities have historically supported Iranian efforts to replenish its missile stockpile and restore key aspects of its defense capability. Western officials estimated in Spring 2025 that the recent Chinese shipments of sodium perchlorate, if converted to ammonium perchlorate, could fuel up to 260 mid-range Iranian ballistic missiles.[21] Sodium perchlorate ignited in dockside shipping containers at Bandar Abbas port on April 26, 2026 — three days after the final PRC-origin shipment, according to Reuters.[22]

Iran also imported military vehicles during this period that may have supported Iranian operations in subsequent conflicts with the United States and Israel. MOD 346428 also imported four Toyota Tundra pickup trucks in January 2025, which Iran could use for military transportation, logistics, drone transport, or internal security.[23] Reuters also located imported Iveco trucks at a Tehran Province customs lot in February 2025.[24] Iran can use this truck type for transport and as a mobile missile launcher, which increases force mobility and complicates enemy targeting. The purposes for which Iran imported these vehicles, and how it has since deployed them, remain unclear, but Iran has used mobile vehicle-based launchers to conduct attacks against Israel and targets in the Gulf during the 12-Day War and the 2026 war. The *New York Times* reported in May 2026, citing US intelligence assessments from early May, that Iran still fielded approximately 70 percent of its mobile launchers nationwide.[25]

Iran also imported materials to support missile production after the 12-Day War to support its priority of rebuilding its degraded ballistic missile production capabilities.[26] Israel badly damaged Iran's missile production program during the 12-Day War by rendering numerous factories inoperable and destroying missile production facilities at Parchin and Shahroud.[27] Iran made the rapid restoration of its ballistic missile production capacity a strategic priority through Fall and Winter 2025.[28] ISW-CTP assessed that this prioritization likely reflected Iran's assumption that Israel would resume the Israel-Iran War in the short term.[29] Reuters documented Iranian imports of equipment and components that could also support multiple stages of missile production, including missile bodies, motor casings, propellant, and explosive payloads.[30] Iran received 93 tons of Chinese titanium on February 9, 2026, that can support missile airframes and rocket-motor casings.[31] Iran also received 268 tons of nitrocellulose and 276 tons of Chinese chemicals under a customs category that includes perchlorates in February 2026.[32] These chemicals can be used to produce rocket propellants and explosives.[33] Iran's rapid reconstitution of its ballistic missile production capabilities during this period has contributed to Iran's retaliatory ballistic missile attacks across the region.

Iran has utilized its military procurement network during the current war to acquire supplies and military equipment, some of which has likely enabled recent attacks on civilian shipping. US and Israeli strikes likely significantly disrupted Iran's ability to import military equipment in March 2026. Reuters reported that Iranian military imports fell 47 percent from the February level to $54 million USD in March 2026.[34] Iranian military imports increased to $77 million USD in May, which suggests that Iran prioritized the recovery of its imports in subsequent months as the United States and Iran engaged in negotiations.[35]

Iran also used the brief suspension of the US naval blockade to import supplies. The United States imposed the naval blockade on April 13, suspended it on June 18, and resumed it on July 14.[36] The US

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naval blockade only restricts maritime shipments, and Reuters documented how Iran used land and air routes to import supplies while the blockade was in effect.[37] Iran received $27 million USD in United Arab Emirates (UAE)-origin goods during the war, nearly all of which arrived by sea. One of these shipments was an electronics shipment that reportedly took place on June 27, when the US naval blockade was suspended.[38] UAE restrictions on cargo flows and financial transactions with Iran since August 2026 may constrain Iran's ability to continue using the UAE as a military procurement and sanctions-evasion hub.[39]

Russia has enabled Iranian attacks that have increased global oil prices by supplying Iran with weapons and key military components.[40]Iran reportedly received $1.9 million USD worth of Russian detonators in June 2026 that are components in missile and drone warheads.[41] The shipment is indicative of the nature of the Iran-Russia relationship, in which Iran is a beneficiary of Russia's expanded defense industrial base and drone production program after originally providing Russia with Shahed drones in 2022.[42] The timing of the reported shipment is consistent with NBC reporting that Russia has transferred drone components, ammunition, and TNT explosives to Iran via the Caspian Sea up to July 2026. Iran and Russia have historically used the Caspian Sea to trade military and non-military goods.[43]

The United States has, as part of Operation Economic Fury, limited Iran's ability to import or export goods by land or air through sanctions and pressure on regional states to restrict Iranian land and air trade. The United States subsequently sanctioned three Iranian railway companies on October 1. The UAE, Georgia, Oman, Azerbaijan, and Iraq restricted or suspended Iranian airline operations in late September.[44] These measures may constrain Iran's future use of alternative land and air routes.

Hezbollah officials have issued ambiguous statements about whether the group would support Iran in a regional conflict, likely to balance its ties to Iran with the need to preserve domestic support. Hezbollah officials, including prominent parliamentarian Hassan Fadlallah, stated on October 26 and 27 that Hezbollah may or may not join a future conflict involving Iran and that the group will not "give guarantees to anyone" on Hezbollah's military course of action.[45] Fadlallah emphasized that Hezbollah's decisions are expressly "made by its leadership" and not subject to foreign commands.[46] Saudi-owned international media previously reported on October 21 and 24 that Iranian officials had instructed Hezbollah not to join a potential future conflict with Iran and that the group agreed to the Iranian request.[47] Fadlallah's remarks strongly suggest that Hezbollah has sought to reframe the media narrative surrounding its courses of action and portray Hezbollah as capable of making independent strategic decisions.[48] Hezbollah's strategic decision-making process is not independent, however, and the Iranian Islamic Revolutionary Guards Corps (IRGC) exhibits significant influence over the organization as a result of the IRGC's extensive reconstitution, military reorganization, and leadership replacement efforts after the 2024 Israel-Hezbollah conflict.[49]

Hezbollah officials' intentional ambiguity concerning whether the group will join a resumed regional conflict reflects the dilemma that the group faces in publicly balancing its commitments to Iran and to Lebanon's Shia population. Hezbollah faces significant organizational pressure to act in support of Iran, partly due to the extent of the IRGC's organizational penetration and partly because Hezbollah seeks to establish deterrence against Israel.[50] Hezbollah has started numerous wars with Israel in southern Lebanon in recent years in support of Iran, most recently in March 2026, even though these wars have resulted in serious damage to its military organization and killed much of its leadership.[51] Hezbollah likely believes that its ability to credibly threaten renewed military action is fundamental to deterring Israel from attacking Iran or Hezbollah itself.

Hezbollah likely faces pressure to avoid another war in southern Lebanon that would damage its

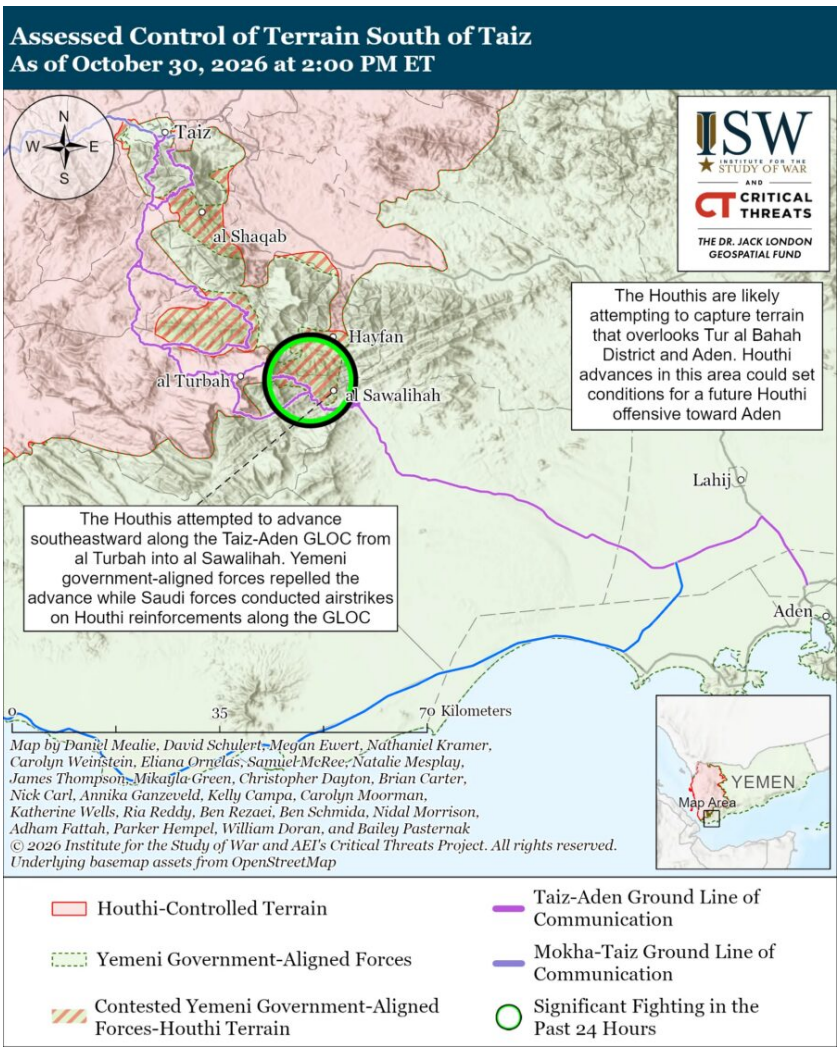
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reputation among its traditional Lebanese Shia support base.[52] Hezbollah deems itself the “people’s resistance” but frequently places Iranian regime interests before those of Lebanese civilians, particularly the group’s Shia supporters in southern Lebanon and Beirut’s southern suburbs.[53] A September 2025 Lebanese public opinion poll found that a majority of Lebanese Shia reportedly support Hezbollah’s disarmament despite the group’s nationalist rhetoric, likely because its wars with Israel have devastated southern Lebanon and other Hezbollah strongholds.[54] This erosion of popular support for Hezbollah within Lebanon is a serious vulnerability for the group, which relies on civilians’ political support in order to resist the Lebanese government’s efforts to disarm Hezbollah.[55] Hezbollah must balance this concern with its raison d’être to use military force against Israel and Israeli forces in Lebanon.[56]

Current indicators suggest that Hezbollah may not participate in a renewed regional conflict by attacking Israel, at least in the near term, despite the group’s ambiguous statements. ISW-CTP has not observed clear threats or military movements that would normally indicate that Hezbollah is preparing for imminent attacks on Israel, although the group is attempting to reconstitute its military capabilities.[57] IRGC officials who are involved in Hezbollah’s strategic decision-making may prefer to exclude Hezbollah from a near-term regional conflict in order to prioritize the group’s military reconstitution amid serious domestic and foreign threats to Hezbollah’s survival.[58]

Recent Houthi attempts to advance southeastward from Taiz Governorate into Lahij Governorate may indicate that the Houthis are attempting to set conditions to besiege or capture Aden City. Yemeni government-aligned forces reportedly repelled a Houthi attempt to advance southeastward from southern Taiz Governorate into al Maqatirah District, Lahij Governorate, on October 30, which likely sought to capture terrain that overlooks Tur al Balah District and leads to Aden City.[59] Yemeni government-aligned sources and Saudi media reported on October 30 that the Houthis attempted a multi-pronged advance southeastward from al Turbah toward al Sawalihah along sections of the Taiz-Aden ground line of communication (GLOC).[60] Yemeni government-aligned forces reportedly repelled the assault.[61] Yemeni government sources reported on October 30 that Saudi airstrikes targeted Houthi forces advancing along the GLOC, which may have hindered the Houthis’ ability to advance into al Sawalihah.[62] The Houthis reportedly deployed reinforcements to nearby Shamayatayn District, west of al Sawalihah, on October 30.[63] The Houthis are likely deploying reinforcements in preparation for another advance attempt into al Maqatirah District.[64] The Houthis likely sought to advance southward into al Maqatirah District to capture terrain that overlooks neighboring Tur al Balah District. Tur al Balah District borders Aden City itself.

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US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

See topline section.

US-Iran Negotiations

Nothing significant to report.

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Iranian Domestic Affairs

See topline section.

Lebanon

The Lebanese government has filed criminal charges against 13 Hezbollah members and affiliates who are involved in the group's illegal military and smuggling activities.[65] The Lebanese Military Court's civilian commissioner, Judge Claude Ghanem, charged the individuals, including two senior Hezbollah security officials, with illegal possession of explosives, belonging to an outlawed armed group, and conspiracy to undermine state authority.[66] The criminal charges are part of the Lebanese government's ongoing investigation into Hezbollah's explosives smuggling activities after Lebanese authorities seized a Hezbollah truck carrying nearly 800 kilograms of explosives on the Beirut-Damascus highway on October 5.[67] The government's criminal case against Hezbollah weapons smuggling, and its willingness to file criminal charges against Hezbollah security officials, represent a serious government effort to hold Hezbollah accountable to the rule of law and disarm the group.[68]

The government still faces significant challenges in prosecuting and convicting Hezbollah officials, however, due to the group's extensive influence within government institutions and its efforts to avoid disarmament. Hezbollah leveraged its alliance with Parliament Speaker Nabih Berri on October 22 to delay a cabinet vote on referring the explosives case to the Judicial Council, which issues binding, unappealable rulings.[69] Lebanese authorities must continue to investigate the case in the interim under the Military Court, whose president, Brigadier General Wassim Fayad, is under Hezbollah's influence and could obstruct Ghanem's efforts to prosecute group officials.[70] Hezbollah is similarly threatening the government with unrest and attempting to discredit the government in order to compel Lebanese authorities to return the group's explosives, drop criminal charges, and abandon disarmament.[71]

Iraq

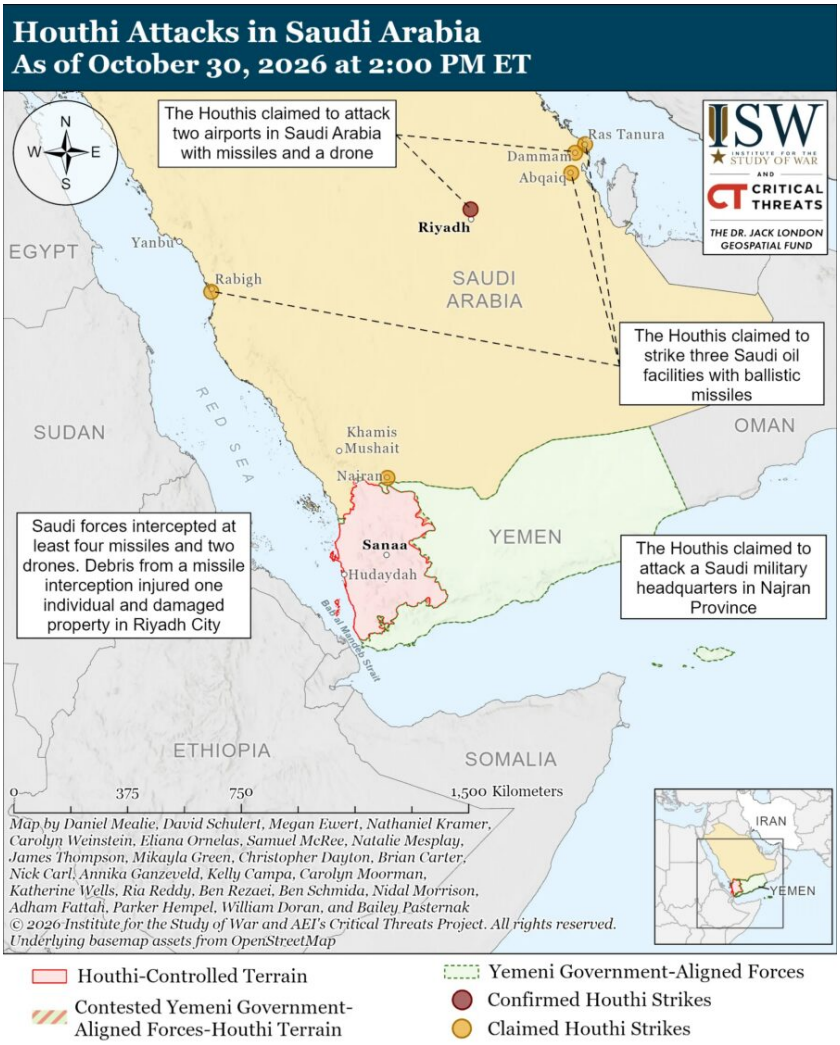
Nothing significant to report.

Arabian Peninsula

Yemeni government-aligned forces reportedly recaptured areas west of Jabal Kahbub, Lahij Governorate, on October 29. An anti-Houthi journalist reported that the Yemeni government-aligned Southern Giants Brigades and Homeland Shield Forces (HSF), supported by Saudi air power, recaptured territory to the west of Jabal Kahbub, Lahij Governorate, on October 29.[72] Commercially available satellite imagery from October 15 to 29 indicates that Houthi forces may have captured and constructed defensive positions on the east side of Jabal Kahbub before withdrawing under pressure on October 29.[73] Houthi forces previously attempted to recapture Jabal Kahbub on September 14, in order to outflank Yemeni government-aligned forces positioned on the Red Sea coastal plain.[74] The Southern Giants and HSF's reported recapture of Jabal Kahbub on October 29 comes amid recent Yemeni government efforts to recapture the southern tip of the Red Sea coastal plain from Houthi forces, including areas along the Bab al Mandeb Strait.[75]

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The Houthis continued their attack campaign to impose economic and political costs on Saudi Arabia to compel the Saudi government to capitulate to Houthi demands. The Houthis claimed that they attacked three important Saudi oil facilities on October 29.[76] ISW-CTP cannot verify the Houthis' claims at the time of this writing, however. The Houthis claimed to strike the Ras Tanura oil refinery, which is Saudi Arabia's largest oil refinery, with a ballistic missile on October 29.[77] The Houthis also claimed to strike the Abqaiq oil processing plant in eastern Saudi Arabia on October 29 for the first time in the 2026 conflict.[78] Unknown actors previously struck the Abqaiq facility, which is the world's largest crude oil processing plant, in July 2026 with drones and missiles.[79] The Houthis announced at the time that they targeted Saudi oil infrastructure in eastern Saudi Arabia but did not explicitly claim the attack on Abqaiq.[80] The Houthis also claimed on October 29 that they struck the Petro Rabigh Refinery, which is in Mecca Province.[81] The Saudi Joint Forces Command reported on October 29 that Saudi air defenses intercepted a drone over Mecca Province.[82] The Houthis denied on October 30 that they targeted Mecca City, however.[83] The Houthis previously claimed to strikeseveral key Saudi critical infrastructure facilities, including the Ras Tanura oil refinery, on October 27.[84] The Houthis have repeatedly targeted Saudi critical infrastructure as part of the Houthis' ongoing strike campaign to compel Saudi Arabia to halt military operations against the Houthis and accept the Houthis' demands, which include lifting Saudi controls on Houthi-controlled ports and airports and granting the Houthis control over Yemen's oil and gas resources.[85]



Map by Daniel Mealie, David Schulert, Megan Ewert, Nathaniel Kramer, Carolyn Weinstein, Eliana Ornelas, Samuel McRee, Natalie Mesplay, James Thompson, Mikayla Green, Christopher Dayton, Brian Carter, Nick Carl, Annika Ganzeveld, Kelly Campa, Carolyn Moorman, Katherine Wells, Ria Reddy, Ben Rezaei, Ben Schmida, Nidal Morrison, Adham Fattah, Parker Hempel, William Doran, and Bailey Pasternak
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Underlying basemap assets from OpenStreetMap

The Houthis separately claimed they struck King Khalid International Airport in Riyadh, King Fahd

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International Airport in Dammam, and an unspecified Saudi military headquarters in Najran Province on October 29.[86] Saudi forces intercepted at least four missiles and two drones over Saudi Arabia on October 29 and 30.[87] Saudi Civil Defense also reported on October 29 that debris from two missile interceptions over Riyadh City injured one individual and damaged property.[88] The US Embassy in Riyadh ordered non-emergency US government employees and their families to leave Saudi Arabia on October 30 due to Houthi attacks on civilian airports and other critical infrastructure.[89]



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Iran Update, October 31, 2026

Ben Rezaei, William Doran, Parker Hempel, Kelly Campa

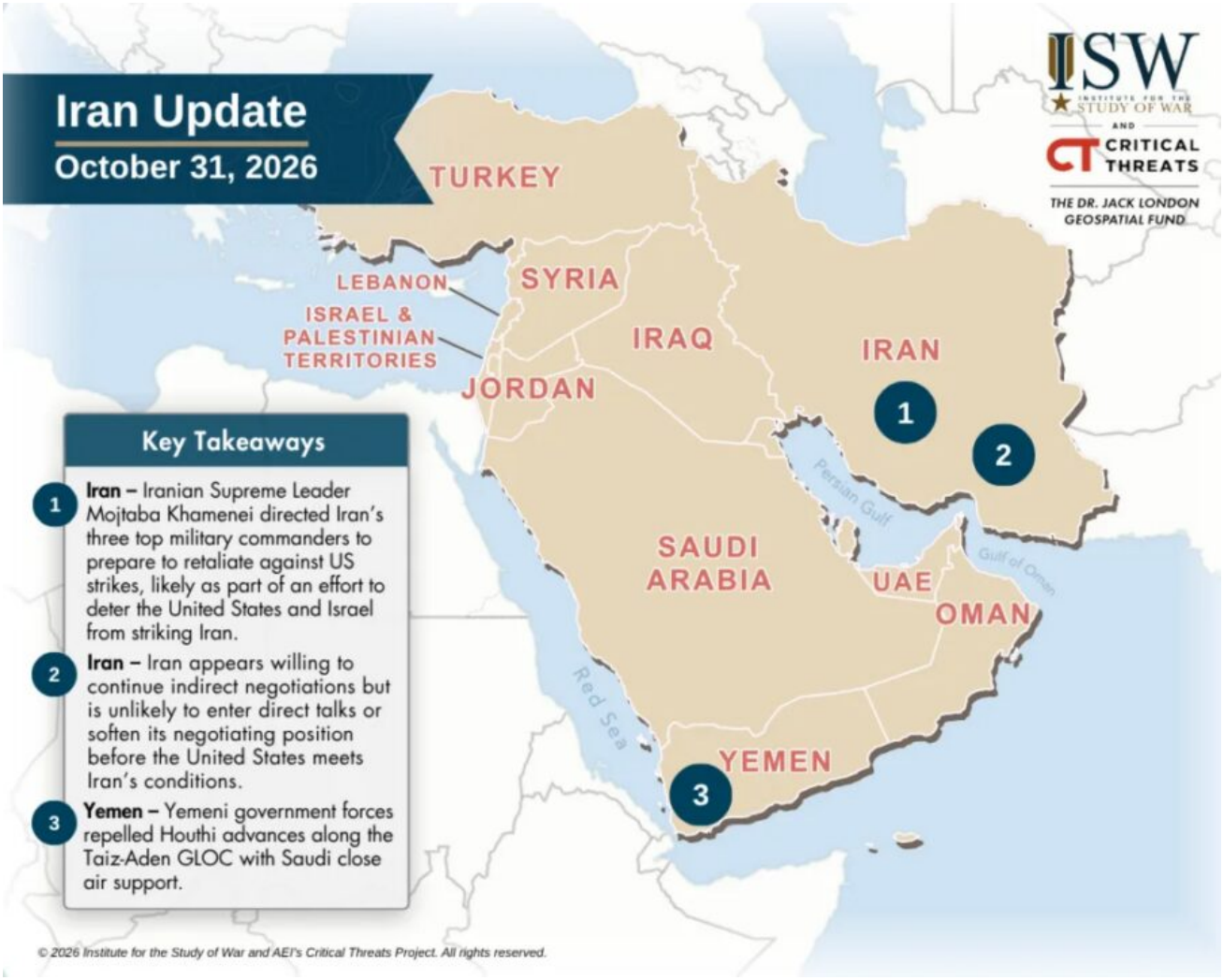
Analyst Notes: Data Cutoff: 2:00 PM ET

The Institute for the Study of War (ISW) and The Critical Threats Project (CTP) at the American Enterprise Institute are publishing updates Monday through Friday to provide analysis on the war with Iran 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. Iranian Supreme Leader Mojtaba Khamenei directed Iran's three top military commanders to prepare to retaliate against US strikes by expanding Iran's targeting bank, likely part of an Iranian effort to deter the United States and Israel from striking Iran.
2. Iran appears willing to continue indirect negotiations through Qatar but is unlikely to enter direct talks or soften its negotiating position before the United States meets Iran's conditions.
3. Yemeni government-aligned forces repelled attempted Houthi advances southeastward along the Taiz-Aden ground line of communication (GLOC) in Maqatirah District, Lahij Governorate, with Saudi close air support (CAS) on October 30 and 31.

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Toplines

Iranian Supreme Leader Mojtaba Khamenei directed Iran's top three military commanders to prepare to retaliate against US strikes by expanding Iran's targeting bank, likely as part of an Iranian effort to deter the United States and Israel from striking Iran.[1] Mojtaba met with Armed Forces General Staff Chief and Khatam ol Anbiya Central Headquarters Commander Major General Ali Abdollahi, Islamic Revolutionary Guards Corps (IRGC) Commander Major General Ahmad Vahidi, and Artesh Commander Major General Amir Hatami on October 31, according to Mojtaba's Telegram channel.[2] Mojtaba ordered the Iranian armed forces to achieve "maximum deterrence," respond immediately and effectively to all threats "without geographical limitations," and expand Iran's target bank to include all "tangible and intangible" US and Israeli assets.[3] Mojtaba's emphasis on "maximum deterrence" indicates that Iran likely seeks to prevent the resumption of US or Israeli strikes by increasing the anticipated costs of Iran's retaliation on the United States and US regional partners with threats of retaliation beyond the location or actors involved in an initial attack. Abdollahi separately warned on X on October 31 that Iran may act preemptively if Iranian forces detect signs of hostile action.[4]

Mojtaba's directive is also almost certainly designed to raise Iranian readiness ahead of an anticipated attack. The commanders reported that Iranian armed forces are raising their readiness in the Persian Gulf, Strait of Hormuz, Gulf of Oman, and Iran's northwestern and southeastern border regions.[5] Iranian forces' readiness in the strait and nearby waters is indicative of Iranian priorities,

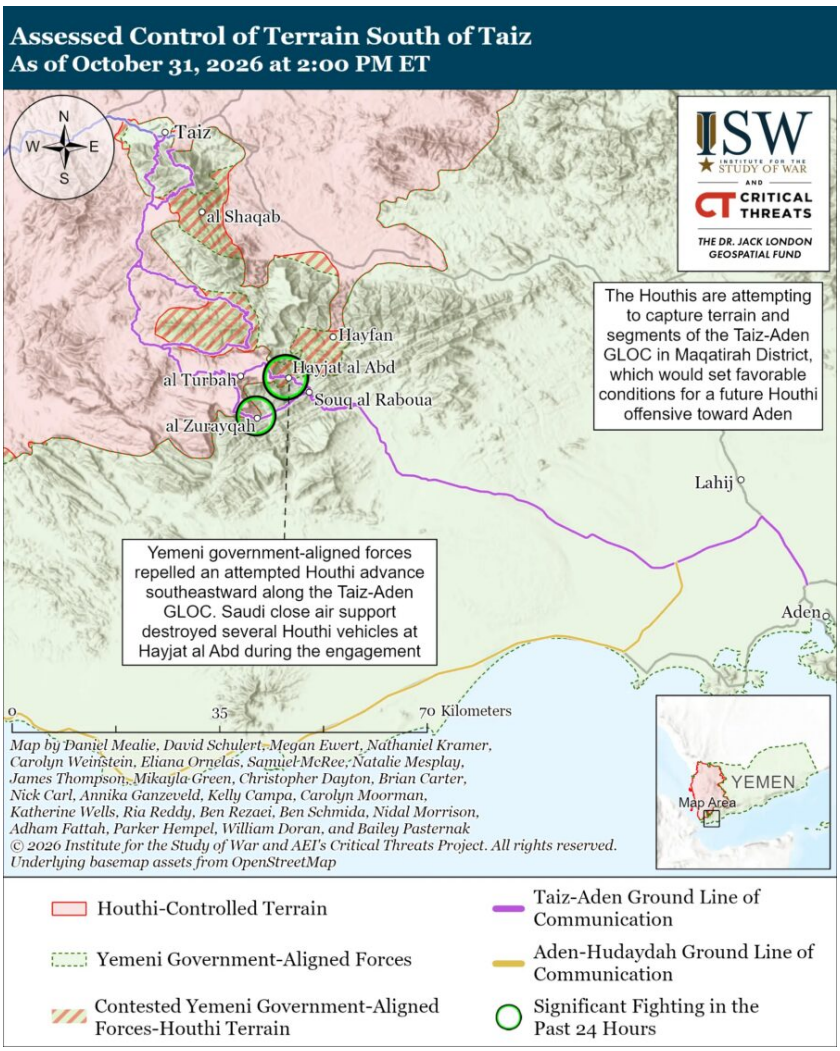
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which include disrupting traffic through the strait as part of an effort to establish Iran's long-term authority over the waterway. The emphasis on Iran's northwestern and southeastern border regions likely also reflects Iranian regime concerns about anti-regime activity that may or may not arise due to perceptions that the regime is distracted by the war with the United States. The commanders also claimed that Iran has increased ammunition and weapons production.[6]

Iran appears willing to continue indirect negotiations through Qatar but is unlikely to enter direct talks or soften its negotiating position before the United States meets Iran's conditions. Axios reported that Qatari mediators held more than 12 hours of talks with Iranian officials in Tehran on October 30 and in Doha on October 31 while maintaining regular contact with the United States.[7] A diplomatic source told an Axios reporter on October 31 that the United States and Iran have not agreed to resume direct negotiations and that the US delegation has not yet set a date to arrive in Doha.[8] Foreign Affairs Minister Abbas Araghchi told Qatari media on October 31 that Iran was studying mediators' proposals but did not view talks to be necessary unless the United States accepted Iran's terms.[9] IRGC-affiliated Tasnim News Agency separately reported on October 31 that Iranian officials do not plan to meet US officials in Doha.[10] Saudi media reported on October 30 that a preliminary framework would see Iran make concessions on its highly enriched uranium and the Strait of Hormuz, while the United States would lift the naval blockade and some sanctions.[11] Saudi media later reported on October 31, citing unspecified sources, that Iran formed committees to review US Vice President JD Vance's general proposal but insisted on a complete ceasefire before any negotiations could take place. The sources also said that Iran demanded guarantees that the United States would abide by a permanent ceasefire in exchange for reopening the strait.[12] These demands remain consistent with Iranian Supreme National Security Council Secretary Major General Mohsen Rezaei's demands on September 19 that the United States end the war on all fronts, release frozen Iranian assets, and lift the naval blockade before negotiations resume.[13] The unspecified sources added that a US delegation would visit Doha only after Qatar and Iran agreed on a roadmap for advancing US-Iran negotiations.[14]

Yemeni government-aligned forces repelled attempted Houthi advances southeastward along the Taiz-Aden ground line of communication (GLOC) in Maqatirah District, Lahij Governorate, with Saudi close air support (CAS) on October 30 and 31.[15] The Houthis are likely attempting to capture terrain in Maqatirah District that could set conditions for a Houthi offensive toward the Yemeni government's de facto capital in Aden.[16] An independent Yemeni journalist and anti-Houthi media reported that Houthi forces attempted to capture Souq al Raboua, which is located at a critical junction in the Taiz-Aden GLOC, on October 30 and 31.[17] Saudi warplanes reportedly conducted airstrikes targeting a Houthi convoy at Hayjat al Abd, about four kilometers northwest of Souq al Raboua, during the attempted advance on October 30 and destroyed several Houthi vehicles. The Saudi airstrikes prevented the remaining Houthi force from establishing control over Souq al Raboua.[18] Yemeni government-aligned forces continued to engage Houthi fighters in the vicinity of Hayjat al Abd and al Zurayqah, Maqatirah District, on October 31.[19]

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Saudi CAS and the restrictive local terrain features are likely challenging Houthi efforts to organize and conduct a successful, large-scale offensive in Maqatirah District. Saudi airstrikes on the Houthi convoy at Hayjat al Abd demonstrate local government-aligned forces' ability to coordinate effective CAS with Saudi forces.[20] Maqatirah District's mountainous terrain and road infrastructure also likely restrict military convoys to slow, single-file traffic in narrow valleys, which renders these convoys far more vulnerable to airstrikes than the Houthis' regular, mobile light infantry forces.[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*

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Iran is continuing to attempt to disrupt shipping in the Strait of Hormuz and disrupt global energy markets in order to pressure the United States into a diplomatic settlement that favors Iran. The United Kingdom Maritime Trade Operations (UKMTO) reported two separate attacks in the Persian Gulf and Strait of Hormuz.[22] A likely Iranian projectile struck an outbound crude oil tanker in the strait on October 28.[23] Another projectile struck a vessel 40 nautical miles south of Lavan Island on October 30, causing an onboard fire.[24] Iran intensified attacks on civilian shipping in the Strait of Hormuz in early October 2026 to disrupt shipping and drive up oil prices in response to recent US successes in facilitating the flow of oil through the strait. The Iranian Artesh Navy separately claimed on October 31 that a non-compliant oil tanker caught fire after striking Iranian naval mines in a prohibited area east of the Strait of Hormuz, although available reporting does not link the claim to either UKMTO incident.[25] The IRGC has repeatedly issued claims such as this in order to falsely imply that the strait retains a significant number of mines in the wake of US Central Command (CENTCOM)'s announcement in late August that US forces had cleared mines.[26]

US-Iran Negotiations

See topline.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

Arabian Peninsula

Yemeni government-aligned forces reportedly recaptured territory in central Jawf Governorate on October 30 and 31, likely as part of an effort to set conditions to recapture the governorate capital at al Hazm. Saudi and Yemeni media reported that Yemeni government-aligned forces established control over all of Jabal Huwayshiyan, which is a mountain range overlooking al Hazm from the northeast, with Saudi CAS between October 30 and 31.[27] The Yemeni Armed Forces announced on October 31 that it captured favorable terrain overlooking al Hazm, which suggests that Yemeni government-aligned forces could be planning a near-term offensive to recapture the city.[28] Yemeni government-aligned forces in northeastern Yemen have generally exhibited more success in halting and reversing the Houthis' territorial gains than their counterparts on the Red Sea coastal plain and in Taiz Governorate since the current conflict began in July 2026.[29]
The Houthis reportedly fired ballistic missiles targeting Aden International Airport on October 31, likely to disrupt weapons shipments to Yemeni government-aligned forces through the airport.[30] The Houthis

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have repeatedly attacked Aden International Airport in recent weeks to disrupt weapons shipments to Yemeni government-aligned forces through the airport and may also seek to deter Saudi partners, such as Pakistan, from delivering military aid to the Yemeni government.[31]
The Houthis also reportedly fired ballistic missiles targeting the Yemeni Government Presidential Palace in Aden on October 31, likely in order to weaken the Yemeni government's legitimacy.[32] The Houthis likely intend to demoralize Yemen's already weak and fractured government and depict it as incapable of defending its urban centers and citizens by striking the Presidential Palace.[33] The Houthis previously struck the palace on October 15, likely in order to generate this same effect.[34]
Saudi air defenses intercepted several likely Houthi drones in Saudi airspace on October 30 and 31. Saudi Joint Forces Command spokesperson Turki al Maliki announced that Saudi air defenses intercepted four drones over Medina, Riyadh, and southern and eastern Saudi Arabia.[35] The Houthis denied on October 30 that they targeted Medina and have not claimed responsibility for any of the drone attacks at the time of this writing.[36] The Houthis have repeatedly launched projectiles at Saudi critical infrastructure across Saudi Arabia in order to maximize Saudi economic and political costs and compel the Saudi government to capitulate to Houthi demands.[37]

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Endnotes

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