Iran Update, November 15, 2026

Benjamin Schmida, Nidal Morrison, Katherine Wells, Annika Ganzeveld

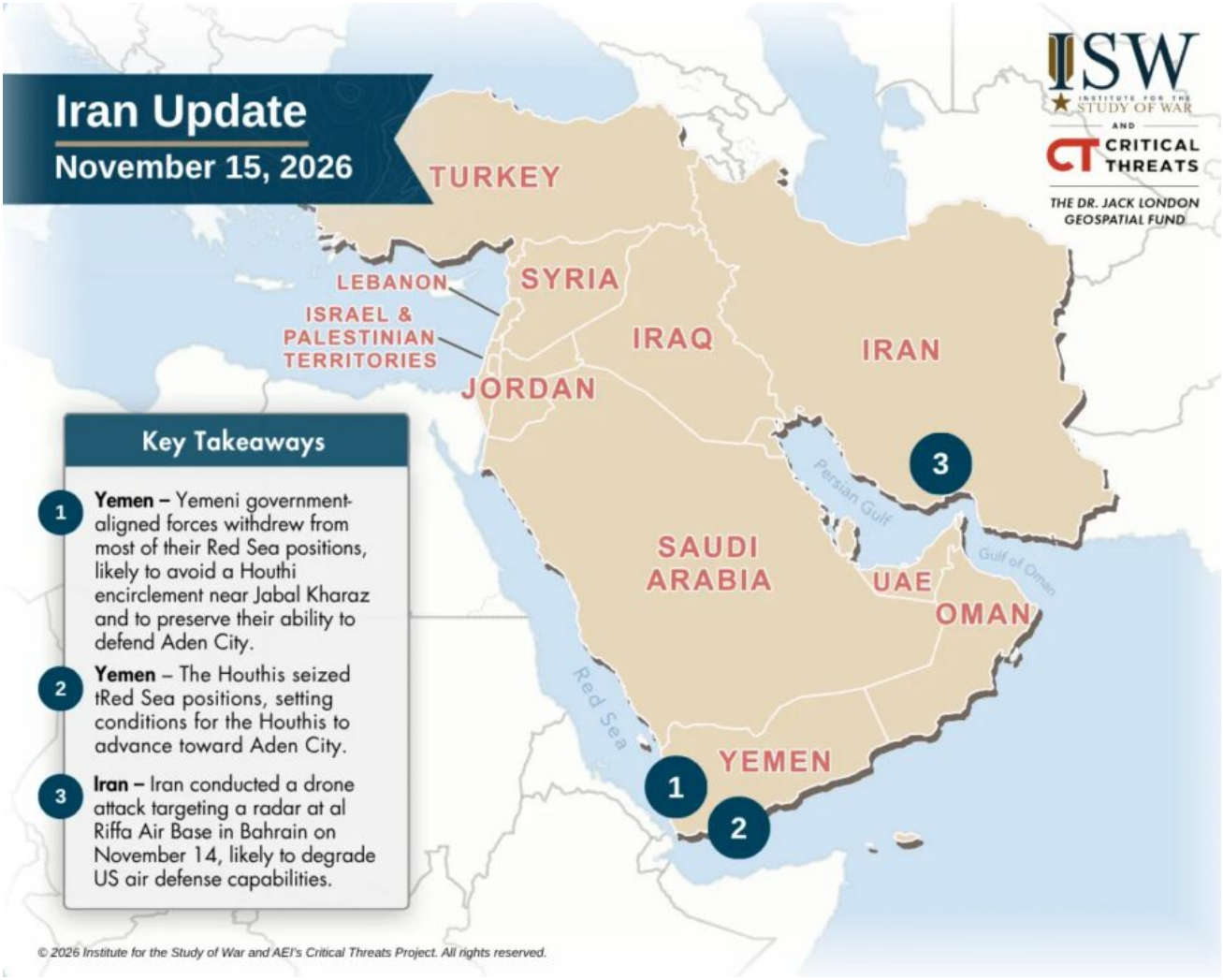
Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. Yemeni government-aligned forces withdrew from most of their Red Sea coastal positions, likely to avoid a Houthi encirclement near Jabal Kharaz and to preserve their ability to defend Aden City.
2. The Houthis seized the Red Sea coastal positions from which Yemeni government-aligned forces withdrew on November 15, which sets conditions for the Houthis to advance toward Aden City.
3. Iran conducted a drone attack targeting a radar at al Riffa Air Base in Bahrain on November 14, likely to degrade US air defense capabilities in response to recent US strikes on Iranian coastal infrastructure.

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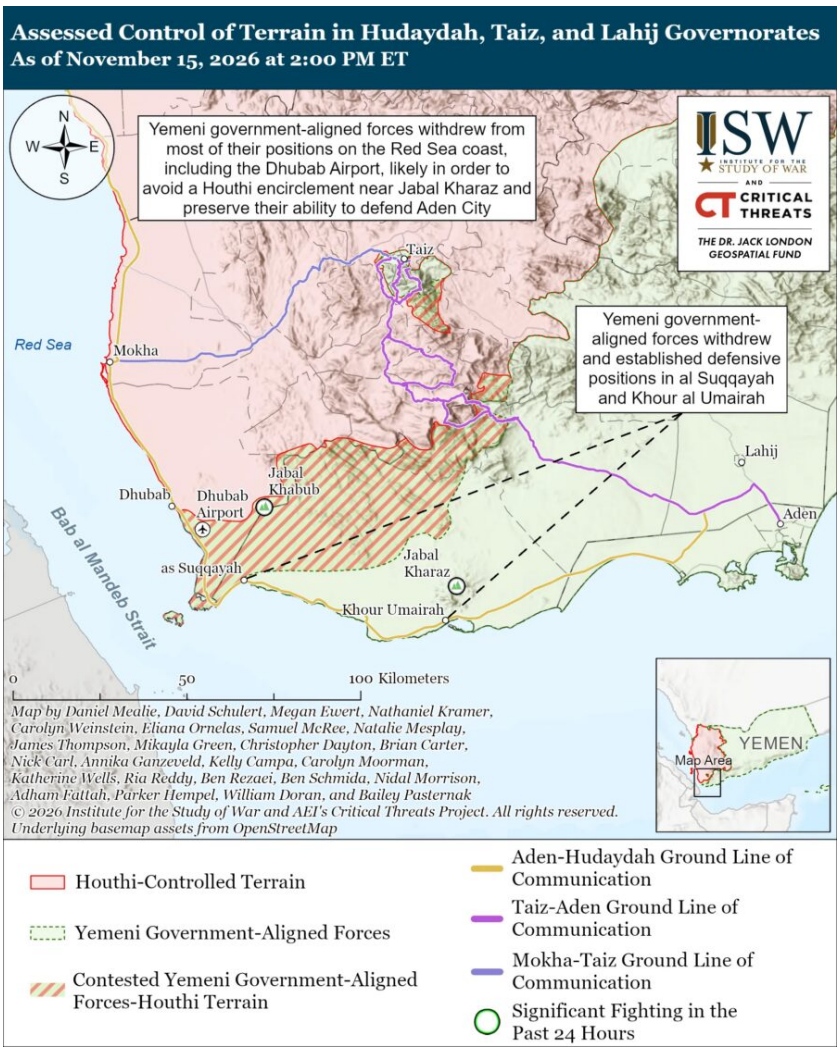


Toplines

Yemeni government-aligned forces withdrew from most of their Red Sea coastal positions, likely to avoid a Houthi encirclement near Jabal Kharaz and to preserve their ability to defend Aden City. The Yemeni government-aligned Southern Armed Forces announced on November 15 that its forces redeployed from the Dhubab Airport and Bab al Mandeb area to reinforce the defense of Aden City.[1] Multiple Yemeni government-aligned sources reported on November 15 that other Yemeni government-aligned factions, including the Southern Giants Brigades, also withdrew from the Bab al Mandeb area and established defensive positions in al Suqqayah and Khour, Lahij Governorate.[2] The Houthis conducted a ballistic missile attack on Khour al Umairah on November 15, indicating the presence of Yemeni government-aligned forces in the area.[3] The attack reportedly killed, according to UK-based Saudi media.[4]

Yemeni government-aligned forces likely withdrew from their Red Sea coastal positions in response to the Houthis' November 12 combined arms offensive operation in southeastern Lahij Governorate, which threatened to isolate Yemeni government-aligned forces on the Red Sea coast by severing the Mokha-Aden ground line of communication (GLOC) near Jabal Kharaz.[5] Yemeni government leadership likely ordered the withdrawal to prevent the Houthis from isolating the Yemeni government's most capable and mobile units, the Southern Giants Brigades and Homeland Shield Forces, on the Red Sea coast. ISW-CTP previously noted that these units would likely be the most capable of defending Aden City.[6]

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The Houthis seized the Red Sea coastal positions that Yemeni government-aligned forces withdrew from on November 15, which sets conditions for the Houthis to advance toward Aden City. The Houthis seized positions at Dhubab Airport, Jabal Kahbub, and al Shatt, according to an independent Yemeni journalist on November 15.[7] The Houthis will likely use their seizure of additional positions along the Mokha-Aden GLOC, along with their control of some territory along the Taiz-Aden GLOC, to try to advance toward Aden. Simultaneous Houthi advances from these GLOCs would force Yemeni government-aligned forces to divide their defensive efforts between the two approaches to Aden City. Yemeni government-aligned forces in southwestern Yemen are already strained as some of their forces are still defending the Houthi-encircled city of Taiz. ISW-CTP will provide further analysis on the implications of Yemeni government-aligned forces' withdrawal from the Red Sea coast in tomorrow's update.

US and Partner Military Operations

Nothing significant to report.

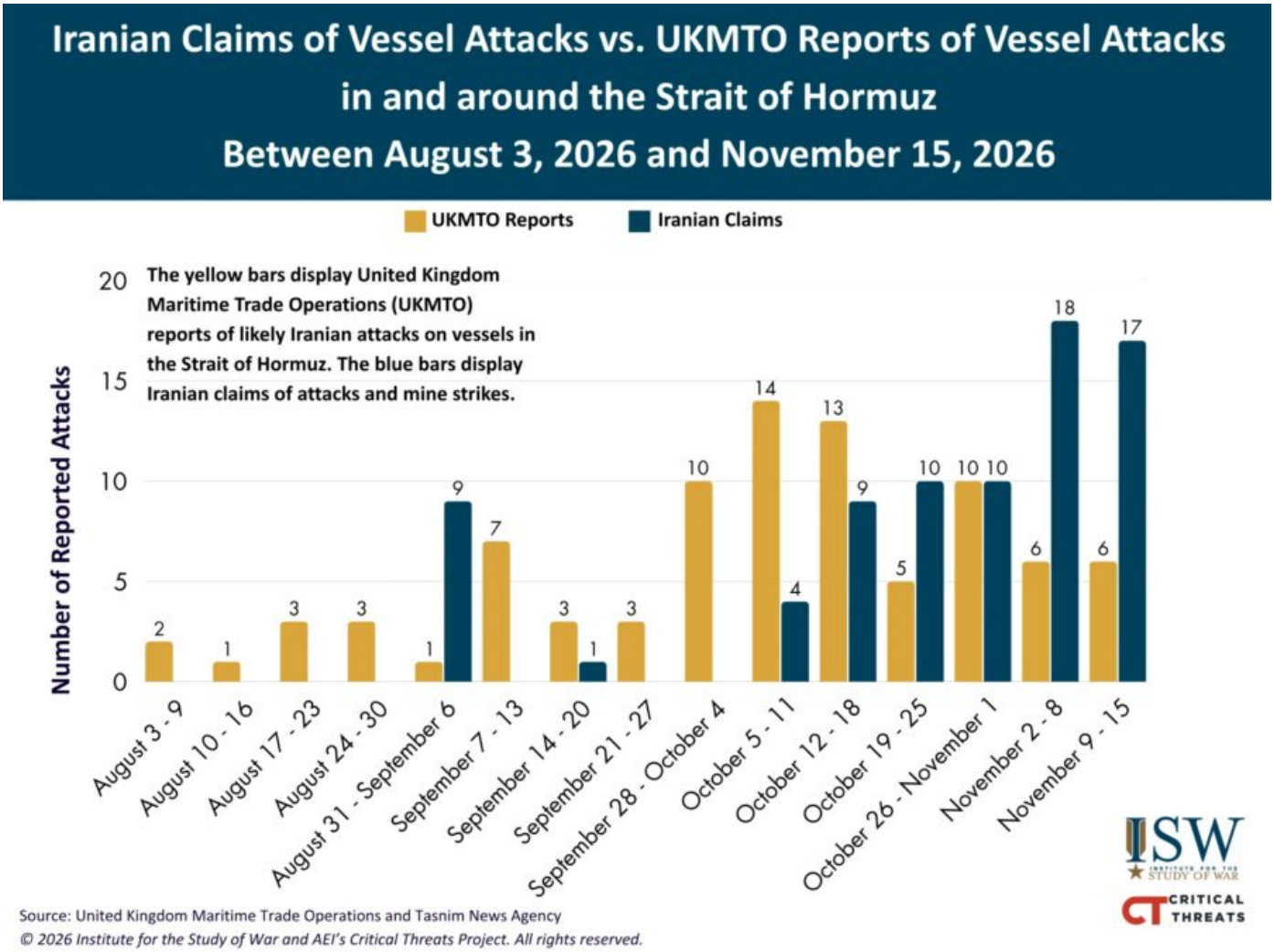
Iranian Strike Campaign

Assessed Iranian War Aims:

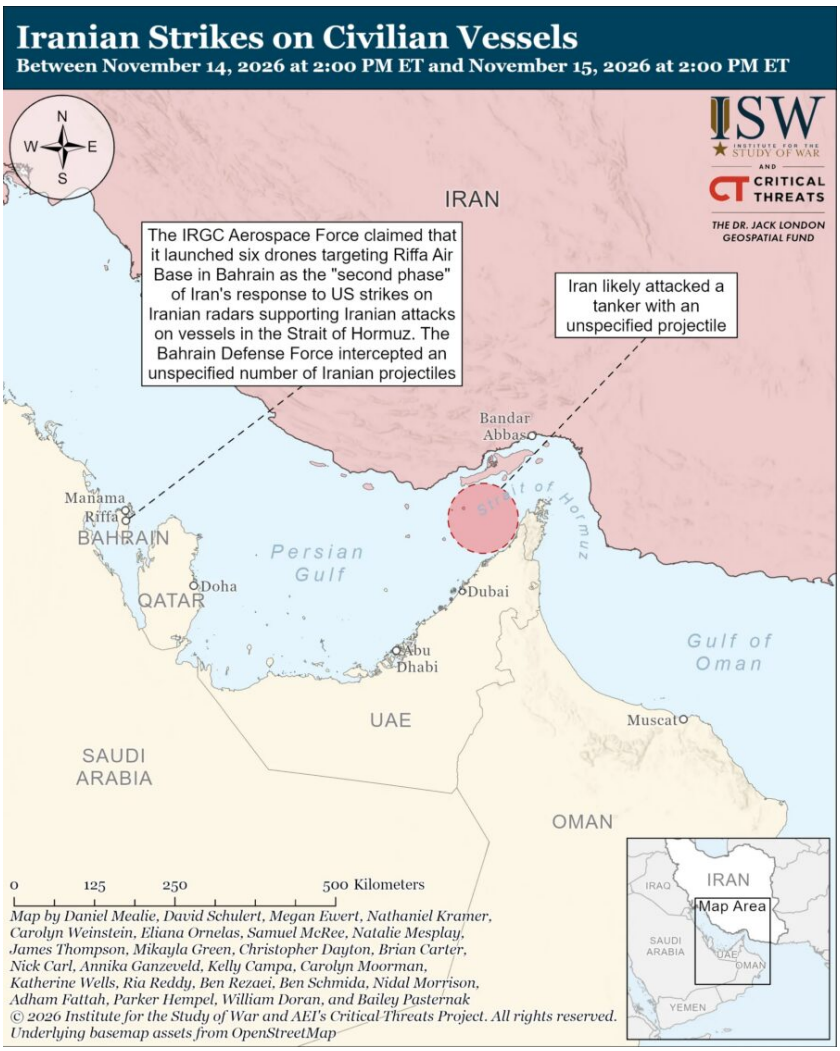
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- *Secure international recognition of Iranian control over the Strait of Hormuz*
- *Degrade the US ability and willingness to continue the war*
- *Restore deterrence vis-à -vis the United States and its regional partners*
- *Divide the United States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

Iran conducted a drone attack targeting a radar at al Riffa Air Base in Bahrain on November 14, likely to degrade US air defense capabilities in response to recent US strikes on Iranian coastal infrastructure. The Bahrain Defense Force confirmed on November 15 that its forces intercepted several Iranian "aerial attacks."[8] The Islamic Revolutionary Guards Corps (IRGC) Aerospace Force claimed on November 14 that it launched six drones targeting a US radar at al Riffa Air Base in Bahrain as part of the "second phase" of Iran's response to recent US attacks on Iran.[9] The IRGC recently conducted a drone strike targeting a US early warning radar in Bahrain on November 13 in retaliation for a US airstrike on a telecommunications tower in Hormozgan Province. US forces intercepted the November 13 drone attack.[10] Iran is likely targeting US radars to degrade the United States' ability to detect incoming projectiles, including its ability to protect shipping and fixed targets in Bahrain. Iran continues to attack shipping in the Strait of Hormuz and to claim that vessels are hitting mines in the strait's southern route to undermine US operations to facilitate the free flow of oil through the strait.[11] ISW-CTP has not observed any indicators that Iran has successfully re-mined the southern route.



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US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

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Arabian Peninsula

The Houthi movement claimed that it struck Saudi critical infrastructure on November 15 as part of its ongoing campaign to compel Saudi Arabia to end military operations in Yemen and accept Houthi demands. The Houthi movement claimed that it launched two ballistic missiles at King Khalid International Airport and a "financial center" in Riyadh City, and two drones at two East-West Pipeline pumping stations on November 15.[12] ISW-CTP cannot verify the Houthis' claims at the time of this writing. Saudi Joint Forces Command Spokesperson Major General Turki al Maliki announced that Saudi forces intercepted three drones in Eastern Province and two ballistic missiles over Riyadh on November 14.[13] Maliki separately announced on November 15 that Saudi forces intercepted two drones near Mecca and two drones near Medina.[14] The Houthis have consistently denied targeting the Islamic holy cities of Mecca and Medina since the start of their strike campaign against Saudi Arabia.[15] The Houthis seek to impose economic and political costs on Saudi Arabia to compel the kingdom to meet Houthi demands, such as recognizing Houthi sovereignty in Yemen, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[16]

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Endnotes

[1] https://x.com/SouthArmed/status/2121848845323649444

[2] https://x.com/IbrahimJalalYE/status/2121951445163606267 ; https://x.com/FaresALhemyari/status/2121997086715518994 ; https://x.com/almasaobl/status/2121903385964101835

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[4] https://www.alaraby.co dot uk/politics/اليمن-انسحاب-قوات-جنوبية-من-باب-المندب-واعتراض-صاروخين-في-الرياض

[5] https://understandingwar.org/research/middle-east/iran-update-november-12-2026/

[6] https://english.aawsat dot com/arab-world/5336733-fighting-against-houthis-resumes-bab-al-mandab-front

[7] https://english.aawsat dot com/arab-world/5336733-fighting-against-houthis-resumes-bab-al-mandab-front

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[9] https://t.me/defapress_ir/72455

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[11] https://tasnimnews dot

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[12] https://t.me/army21ye/4089

[13] https://x.com/CJFCSpox/status/2121751624162971802 ; https://x.com/CJFCSpox/status/2121762778041999737 ; https://x.com/CJFCSpox/status/2121791012934942858 ; https://x.com/CJFCSpox/status/2121775615456223642

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Iran Update, November 16, 2026

William Doran, Bailey Pasternak, Katherine Wells, Yahel Tamir, Kinser Rafert, Benjamin Schmida, Annika Ganzeveld

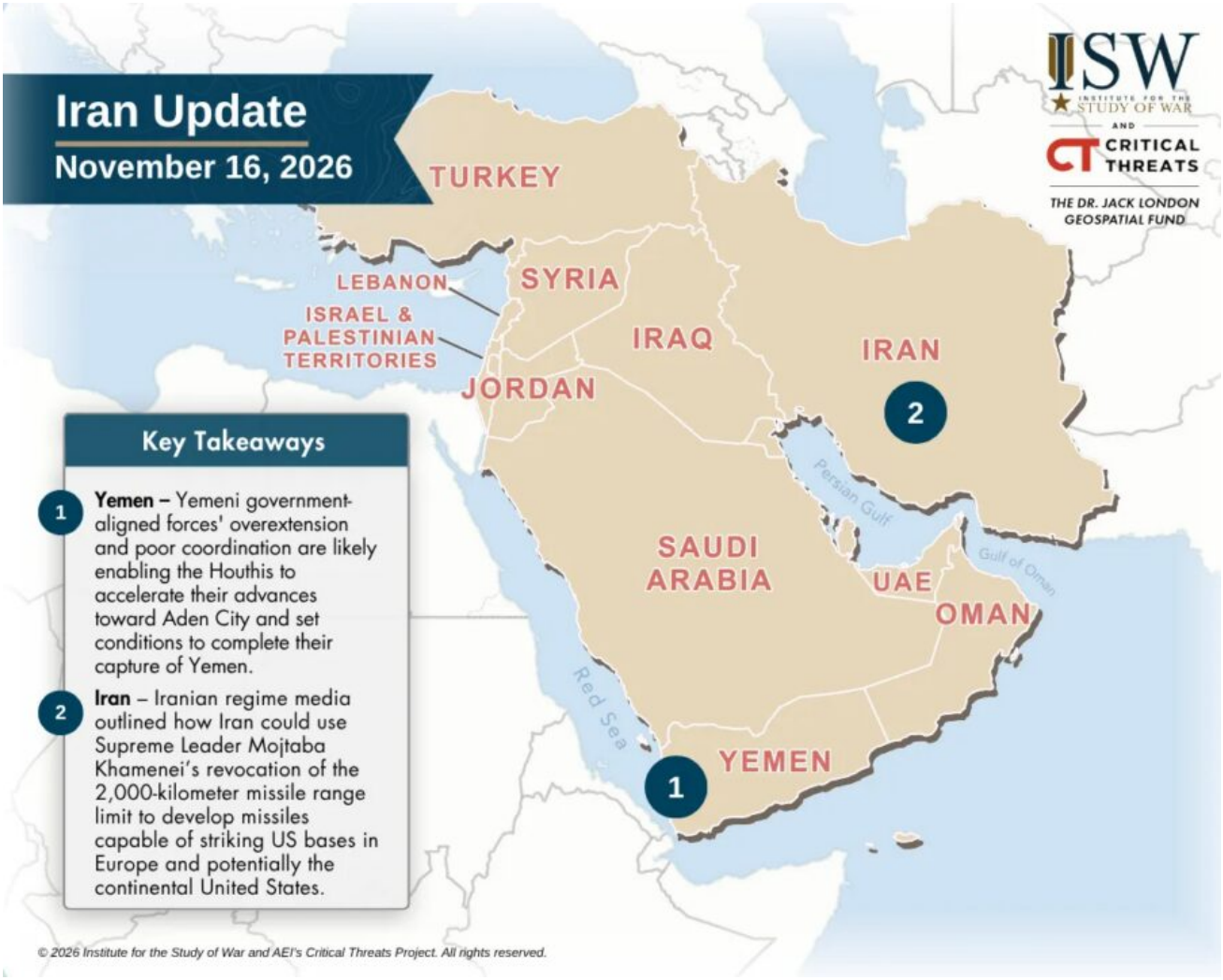
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Key Takeaways

1. Yemeni government-aligned forces' overextension and poor coordination are likely enabling the Houthis to accelerate their advances toward Aden City and set conditions to complete their capture of Yemen.
2. The Yemeni government's withdrawal from Red Sea coastal positions has likely only temporarily thwarted Houthi efforts to outflank and encircle government-aligned forces without resolving these forces' underlying vulnerabilities.
3. Islamic Revolutionary Guards Corps (IRGC)-affiliated Tasnim News Agency outlined on November 14 how Iran could use Supreme Leader Mojtaba Khamenei's revocation of the regime's 2,000-kilometer missile range limit to develop missiles capable of striking US bases in Europe and possibly the continental United States.
4. Hezbollah is reportedly redeploying some fighters and weapons to southern Lebanon, which could enable the group to pursue several courses of action (COAs) against Israel and the Israel Defense Forces (IDF).

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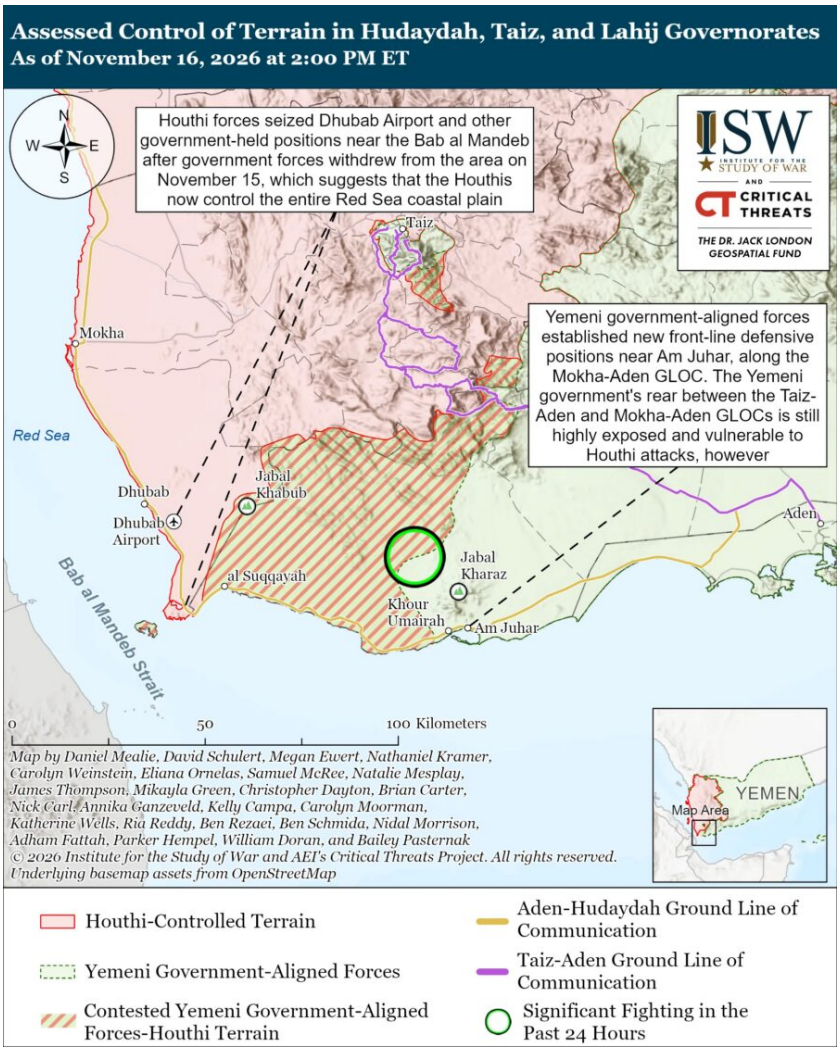
Toplines

Yemeni government-aligned forces' overextension and poor coordination are likely enabling the Houthis to accelerate their advances toward Aden City and set conditions to complete their capture of Yemen. The Yemeni government's rapid withdrawal from the Red Sea coastal plain and western Lahij Governorate on November 15 and 16 indicates that Yemeni government-aligned forces are failing to effectively defend against Houthi advances in southwestern Yemen.[1] These Houthi advances are increasingly posing an existential threat to the Yemeni government by threatening its capital in Aden, which is one of the few major cities that remain under government control. The Houthi movement views itself as Yemen's legitimate government, and the group's strategic objective is to control all of Yemen.[2] Houthi military actions, including advances toward Aden and attacks on Saudi Arabia, are designed to set conditions for controlling all of Yemen by eroding the Yemeni government's territorial control and compelling Saudi Arabia to end its military operations in Yemen, which would seriously degrade Yemeni government-aligned forces' ability to fight the Houthis.[3] Houthi rule over all of Yemen would solidify the group's ability to threaten maritime shipping and regional states like Saudi Arabia and Israel because no local military force would have the capability to effectively challenge the movement's territorial control.

Yemeni government-aligned forces have established new front-line defensive positions after withdrawing from the Red Sea coastal plain. Government forces established defensive positions near Jabal Kharaz, which is about 80 kilometers east of the Bab al Mandeb Strait and 100 kilometers west of Aden, on

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November 15 and 16.[4] Houthi fighters have advanced to establish control over former Yemeni government-held positions on the coastal plain, such as Dhubab Airport, and reportedly advanced eastward along the Mokha-Aden ground lines of communication (GLOC) toward Jabal Kharaz on November 16, according to an independent Yemeni journalist.[5]



The Yemeni government's withdrawal from Red Sea coastal positions has likely only temporarily thwarted Houthi efforts to outflank and encircle government-aligned forces without resolving these forces' underlying vulnerabilities. Yemeni government-aligned forces withdrew from the coastal plain and much of Lahij Governorate because their overextended frontlines between positions along the Mokha-Aden and Taiz-Aden GLOCs, on opposite sides of Lahij Governorate, left vast exposed rear areas for the Houthis to infiltrate and attack.[6] Yemeni government-aligned forces' need to defend the two far-apart GLOCs made it possible for the Houthis to infiltrate through the Yemeni government's overextended, porous frontline between these roadways and threaten their defense of southwestern Yemen. The Houthis have repeatedly attempted to advance in these rear areas between the Taiz-Aden and Mokha-Aden GLOCs and threatened to sever the roadways and encircle Yemeni government-aligned forces on the frontlines in recent weeks.[7] Yemeni government-aligned forces' withdrawal to Jabal Kharaz has temporarily reinforced Yemeni government positions closer to the rear, but a long and porous frontline still exists between the GLOCs that the Houthis can, and likely will, attempt to infiltrate.

Yemeni government-aligned forces remain a fragmented coalition of rival factions that have repeatedly failed to coordinate beyond short-term tactical operations, which has contributed to military defeats since September 2026 and undermined Aden's defense.[8] Saudi Arabia replaced its Joint Forces Commander,

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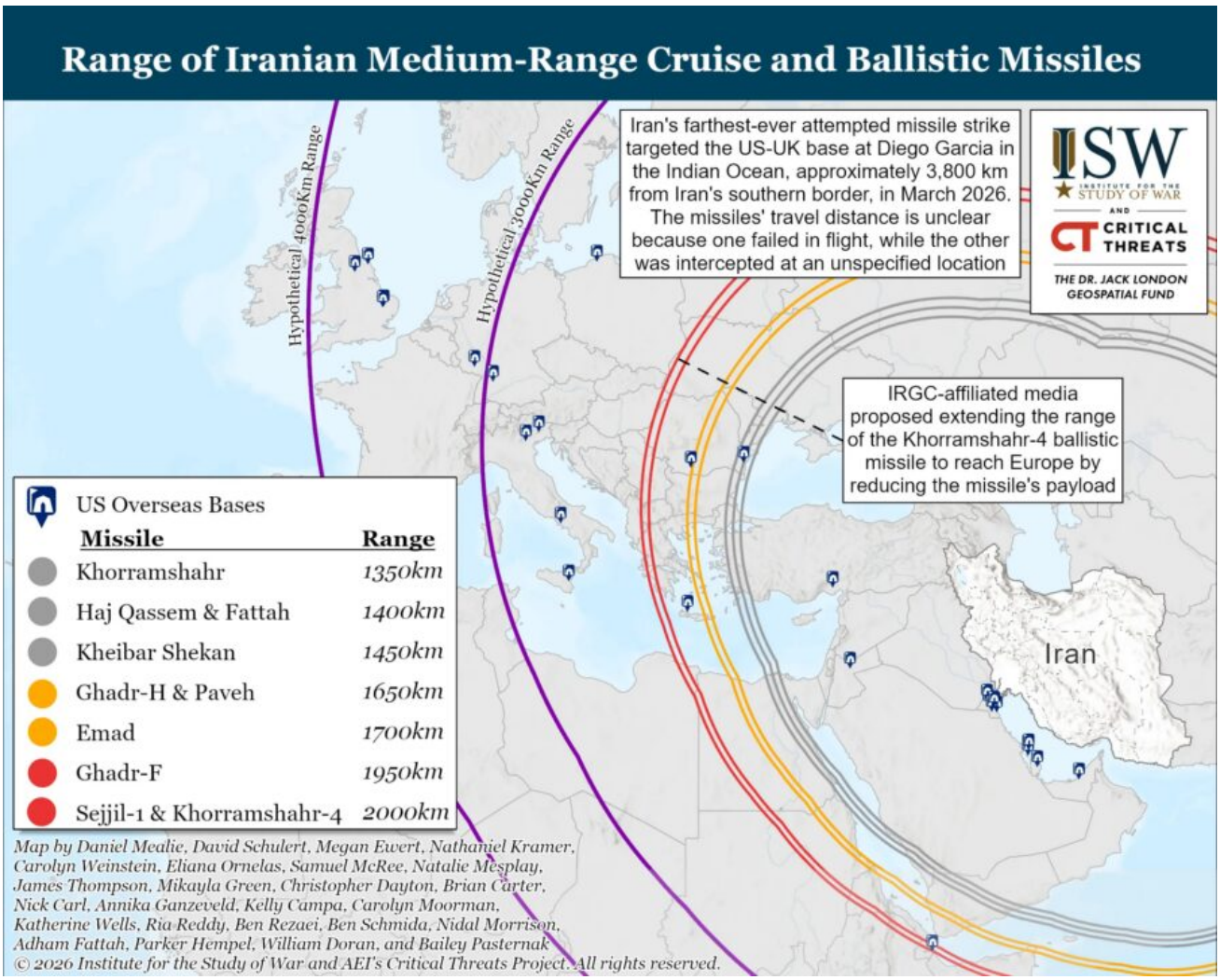
who is responsible for overseeing Saudi military operations in Yemen, with Saudi Chief of the General Staff Fayyad al Ruwaili on November 16, likely in an effort to strengthen coordination among Saudi and Yemeni government-aligned forces.[9] Yemeni government-aligned forces must rapidly improve coordination to halt Houthi advances, but a new Saudi Joint Forces Commander is unlikely to immediately overcome entrenched rivalries and command-and-control deficiencies across the fragmented anti-Houthi coalition.[10]

The Yemeni government's withdrawal also provides the Houthis with opportunities to further erode Yemeni government-aligned forces' ability to defend Aden and threaten maritime shipping. The Yemeni government forfeited over 80 kilometers of the Mokha-Aden GLOC to the Houthis by withdrawing to its present positions at Jabal Kharaz.[11] This enables the Houthis to deploy reinforcements and supplies from major cities like Sanaa and Hudaydah to Lahij Governorate with less exposure to Yemeni government fire.[12] Expanded Houthi control over the Red Sea coastal plain and western Lahij Governorate also enables Houthi fighters to deploy radars and short-range weapons that they can use to locate and attack vessels in the Bab al Mandeb and the Gulf of Aden if the Houthis decide to disrupt shipping.[13]

Islamic Revolutionary Guards Corps (IRGC)-affiliated Tasnim News Agency outlined on November 14 how Iran could use Supreme Leader Mojtaba Khamenei's revocation of the regime's 2,000-kilometer missile range limit to develop missiles capable of reaching US bases in Europe and possibly the continental United States.[14] Tasnim proposed reducing the payload of Iran's medium-range Khorramshahr-4 ballistic missile to 500 kilograms (kg) to increase the missile's range to 3,000-4,000 kilometers (km). Tasnim noted that such a range would enable the Khorramshahr-4 to reach southeastern, eastern, and potentially central Europe.[15] The Khorramshahr-4 can currently carry a maximum payload of 1,500 kg and has a maximum range of 2,000 km.[16] Reducing a missile's payload decreases the effectiveness of its impact. Iran may be willing to accept this trade-off to extend the range of some of its missiles, given the informational and deterrent value of demonstrating an ability to reach US bases and allied targets at greater distances. Iran's farthest attempted missile attack to date targeted Diego Garcia, a US base in the Indian Ocean located about 3,800 km from southern Iran.[17] Iran used two missiles in the attack, but the missiles' flight distance remains unknown because one missile failed mid-flight and the other was intercepted before impact.[18]

Tasnim also claimed that Iran could try to develop intercontinental ballistic missiles (ICBMs) with a range of 5,500 km and above to attack the continental United States by developing existing Iranian space launch vehicle (SLV) technology.[19] SLVs and ICBMs share similar technology, and the Defense Intelligence Agency previously noted in a 2019 report that Iran was developing its SLVs with lift capacity and boosters that could be capable of reaching ICBM ranges if they were reconfigured.[20] Russia has helped Iran develop its SLV program in recent years.[21] Tasnim identified the Ghased, Zuljanah, and Ghaem SLVs as potential foundations for an intercontinental missile capability, noting that Iran would need to modify these systems or develop underground silos capable of launching larger missiles.[22] Iran would also need to develop new warheads able to withstand the extreme heat and pressure generated during high-speed atmospheric re-entry over intercontinental ranges.[23] Some lower-level Iranian officials have advocated in recent months for Iran to develop ICBMs. Eighty-five parliamentarians published a letter in May 2026 to Mojtaba calling for the development of ICBMs to protect Iran, for example.[24]

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Hezbollah is reportedly redeploying some fighters and weapons to southern Lebanon, which could enable the group to pursue several courses of action (COAs) against Israel and the Israel Defense Forces (IDF). An Israeli military correspondent reported on November 15 that Israeli military intelligence assesses that Hezbollah is increasingly deploying fighters to villages located just north of the IDF's "Yellow Line" in southern Lebanon.[25] The correspondent added that Hezbollah is reestablishing weapons stockpiles in these villages and conducting surveillance of IDF positions in southern Lebanon.[26] ISW-CTP has observed limited instances of Hezbollah staging forces and conducting likely surveillance operations near IDF positions in southern Lebanon in recent weeks.[27] Israeli military intelligence also reportedly estimates that Hezbollah maintains "thousands" of first-person view (FPV) drones and 10,000 rockets and missiles that are mostly positioned within range of striking targets in northern Israel.[28] Hezbollah reportedly launched 1,000 drones and over 700 rockets at Israel between late April and late May 2026.[29] ISW-CTP has repeatedly assessed that Hezbollah is attempting to reconstitute its drone arsenal and increase the range and payload capacity of its FPV drones but cannot independently validate reported Israeli intelligence estimates of the group's current drone, rocket, and missile stockpiles.[30]

ISW-CTP is considering three possible COAs that Hezbollah could pursue based on the report that Hezbollah is increasingly deploying fighters and weapons to southern Lebanon. Hezbollah is almost certainly redeploying forces and reconstituting its military capabilities to prepare to fight Israel, but the current indicators are agnostic to the scope and timing of a potential future conflict with Israel.

- **Hezbollah could be preparing to conduct offensive operations targeting northern Israel.**

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The November 15 Israeli intelligence assessment highlighted that most of Hezbollah's rocket arsenal is located within range of striking northern Israel.[31] Israeli media separately reported that Hezbollah is working to increase the range and payload capacity of its FPV drones, which could similarly be used to strike targets in northern Israel.[32] Hezbollah could alternatively use its rocket and drone arsenal to target Israeli forces and positions in southern Lebanon, however. ISW-CTP has not observed clear threats that would normally indicate that Hezbollah is preparing for imminent attacks on Israeli territory, unlike the multiple public threats that Hezbollah issued leading up to the US and Israeli strikes on Iran in February 2026.[33]

- **Hezbollah could be preparing to conduct operations against the IDF to prevent further IDF advances into southern Lebanon.** The IDF's "Yellow Line" currently extends between eight and 10 kilometers within Lebanese territory from the Israel-Lebanon border.[34] Israeli Defense Minister Israel Katz has threatened Hezbollah in recent weeks that the IDF would continue to advance in southern Lebanon if Hezbollah attacks Israel.[35] Hezbollah views itself as Lebanon's primary defender against IDF incursions and would seek to prevent the IDF from advancing further into Lebanon and displacing the group's predominantly Shia support base.[36]
- **Hezbollah could be preparing to launch a broader campaign to expel the IDF from Lebanon.** Hezbollah has historically used military force to attempt to compel Israeli withdrawals from southern Lebanon, and the group continues to demand a complete IDF withdrawal from Lebanon.[37] Hezbollah previously targeted civilian populations in northern Israel as a tactic to compel the IDF to withdraw from southern Lebanon.[38]

The Israeli intelligence assessment of Hezbollah's military preparations follows reports from UK-based, Saudi-owned media in recent weeks that Iranian officials had instructed Hezbollah not to join a potential future conflict with Iran and that the group had agreed to the Iranian request.[39] ISW-CTP previously assessed that these reports suggested that Hezbollah may refrain from attacking Israel in the near term, but ISW-CTP cannot independently verify the validity of these reports.[40] Hezbollah officials have recently expressed a desire to avoid renewed fighting with Israel in order to protect the group's Shia constituents in southern Lebanon from further attacks and displacement.[41] 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.[42] Hezbollah likely views recouping popular support, particularly among its Shia base, as a requirement for its political and military reconstitution.[43]

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.

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US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Iranian security forces continue to counter infiltration attempts by Kurdish opposition fighters along Iran's western border. The IRGC Ground Forces Najaf-e Ashraf Operational Base announced on November 15 that 4th Ansar ol Rasoul Operational Brigade forces killed a group of Kurdish Free Life Party (PJAK) fighters attempting to infiltrate Iran's western border.[44] The base claimed that the fighters intended to conduct attacks and that its forces seized unspecified weapons.[45] PJAK has not commented on this incident at the time of this writing. Anti-regime media separately reported that PJAK fighters attacked three IRGC bases in Sardasht County, West Azerbaijan Province, less than 15 kilometers from the Iraq border, on November 15.[46] The outlet claimed that PJAK fighters killed at least two IRGC personnel, including a commander.[47] The IRGC has not commented on the reported attacks at the time of this writing. IRGC forces recently killed two PJAK fighters attempting to infiltrate Iran's northwestern border near Sardasht on November 12.[48] PJAK's military wing confirmed that one of its members from Sanandaj, Kurdistan Province, was killed in that clash and threatened to respond to regime attacks on its fighters.[49] Iranian military commanders have recently emphasized that Iranian forces are increasing readiness along Iran's northwestern and southeastern borders, reflecting the regime's concerns about anti-regime militant activities.[50]

Lebanon

See topline section.

Iraq

Nothing significant to report.

Arabian Peninsula

The Houthis likely launched drones targeting Saudi critical infrastructure on November 16.[51] Saudi Joint Forces Command Spokesperson Major General Turki al Maliki announced on November 16 that Saudi air defenses intercepted two Houthi drones near Riyadh and Mecca.[52] The Houthis have not claimed any attacks on Saudi Arabia since ISW-CTP's last data cutoff on November 15, however. The Houthis seek to impose economic and political costs on Saudi Arabia to compel the kingdom to submit to Houthi demands, which include ending Saudi support for Yemen's legitimate government, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[53]

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Endnotes

[1] https://understandingwar.org/research/middle-east/iran-update-november-15-2026/ ; https://x.com/SouthArmed/status/2121848845323649444 ; https://x.com/war_cube/status/2121902775051362340?a=cYzmGnDniu06eBHcfpg&s=20 ; https://x.com/FaresALhemyari/status/2122334979887653089?a=VdWiyyPxAyJnbH6aFA8&s=20 ; https://x.com/MMY1444/status/2122054923298996698?a=DnMVCZopYkIkY6vKEqQ&s=20

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Iran Update, November 17, 2026

Nidal Morrison, Parker Hempel, Adham Fattah, Parth Mulay, Kinser Rafert, Carolyn Moorman, Brian Carter

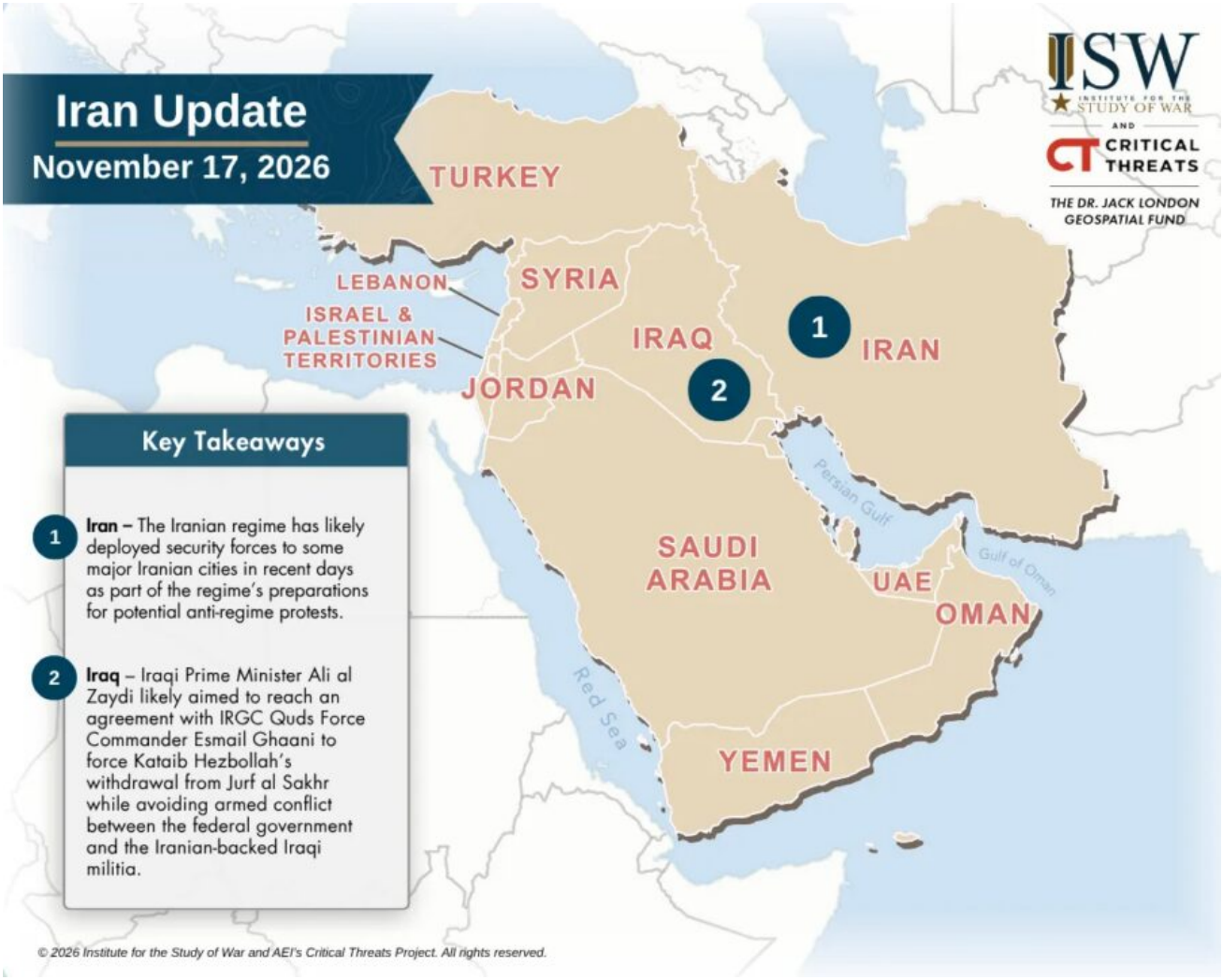
Analyst Notes: Data Cutoff: 2:00 PM ET

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. The Iranian regime has likely deployed security forces to some major Iranian cities in recent days as part of the regime's preparations for potential anti-regime protests. Anti-regime media and an Islamic Revolutionary Guards Corps (IRGC) affiliated Telegram channel posted footage of the deployment of regime security forces to Tehran, Tehran Province, and Esfahan, Esfahan Province on November 14 and November 16, respectively.
2. The regime's willingness to deploy security forces to major cities like Tehran and Esfahan before protests materialized suggests that the regime may respond to a new protest in Abdanan, Ilam Province, with further nationwide security deployments as a preemptive measure. Regime security forces at the Abdanan protest appeared to refrain from using lethal or heavy force to crack down on the protesters, likely to avoid inflaming local tensions and triggering broader nationwide unrest.
3. Iraqi Prime Minister Ali al Zaydi likely aimed to reach an agreement with IRGC Quds Force Commander Esmail Ghaani to force Kataib Hezbollah's withdrawal from Jurf al Sakhr while avoiding armed conflict between the federal government and the Iranian-backed Iraqi militia. Shia Coordination Framework sources told US-funded, regional media on November 17 that Zaydi and Ghaani reached an agreement to allow unspecified Popular Mobilization Forces (PMF) units and security forces to enter Jurf al Sakhr in exchange for Kataib Hezbollah's withdrawal from the area.
4. Some Kataib Hezbollah members, especially those close to Secretary General Abu Hussein al Hamidawi, will very likely try to confront any security force that attempts to enter Jurf al Sakhr or otherwise undermine any agreement that requires Kataib Hezbollah's withdrawal from Jurf al Sakhr. Hamidawi and senior Kataib Hezbollah official and Popular Mobilization Forces (PMF) Chief of Staff Abdul Aziz al Muhammadawi, aka Abu Fadak, have had a rivalry over control of Kataib Hezbollah since 2020, but the recent standoff with the Iraqi government over Jurf al Sakhr appears to have exacerbated those internal divisions.

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Toplines

The Iranian regime has likely deployed security forces to some major Iranian cities in recent days as part of the regime's preparations for potential anti-regime protests. Anti-regime media and an Islamic Revolutionary Guards Corps (IRGC) affiliated Telegram channel posted footage of the deployment of regime security forces to Tehran, Tehran Province, and Esfahan, Esfahan Province on November 14 and November 16, respectively.[1] There have not been protests in either location, meaning that the regime deployed the forces preemptively. The proximate trigger for the deployments is not clear, however. Iranian officials have reportedly grown more concerned over domestic unrest fomenting due to inflation and fuel shortages, according to a senior Iranian official and an Iranian security official speaking to Reuters on November 15.[2] US economic pressure on the regime has only exacerbated Iran's pre-existing economic troubles.[3] Iran has also recently launched a mass mobilization and training effort called the Janfada ("Those Who Sacrifice Their Lives") Campaign to bolster domestic support and expand security force manpower to suppress both protests and anti-government militancy.[4]

The regime's willingness to deploy security forces to major cities like Tehran and Esfahan before protests materialized suggests that the regime may respond to a new protest in Abdanan, Ilam Province, with further nationwide security deployments as a preemptive measure. Anti-regime media and open-source intelligence (OSINT) accounts on X posted footage on November 17 of at least 1,000 Iranian protesters in Abdanan chanting in response to a November 14 bus

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crash that killed at least 12 people and injured at least 16 others.[5] Protesters first chanted against government incompetence and economic mismanagement, but the chants evolved into calls for the overthrow of the regime.[6] The regime deployed Law Enforcement Command (LEC) units to monitor the ongoing rally, though Iranian regime and local sources did not report major clashes.[7] Some OSINT accounts have claimed that Basij paramilitary personnel also deployed to Abdanan, but ISW-CTP is unable to independently verify these deployments. The regime will now likely calculate that it needs to deploy security forces to other major cities given the scale of the protest in Abdanan.

Regime security forces at the Abdanan protest appeared to refrain from using lethal or heavy force to crack down on the protesters, likely to avoid inflaming local tensions and triggering broader nationwide unrest.[8] Anti-regime media reported on November 17 that Iranian LEC units arrested at least six people at the protests but otherwise did not appear to use significant force against the protesters.[9] The regime may calculate that a single large protest does not represent an existential threat, and that forcefully cracking down could trigger wider demonstrations nationwide. Abdanan has historically been a hotspot for large anti-regime protests, including during the 2022-2023 Mahsa Amini and Winter 2026 protest waves.[10] Ilam Province also has a sizeable Kurdish population, which the regime has historically considered to be a threat to regime security.[11] The regime's concerns about Iran's Kurdish population grew particularly acute during the Mahsa Amini protest wave, as the protests were partly concentrated among Kurdish communities that the regime worried the Kurdish militias could try to co-opt, for example.[12]

Iraqi Prime Minister Ali al Zaydi likely aimed to reach an agreement with IRGC Quds Force Commander Esmail Ghaani to force Kataib Hezbollah's withdrawal from Jurf al Sakhr while avoiding armed conflict between the federal government and the Iranian-backed Iraqi militia. Shia Coordination Framework sources told US-funded, regional media on November 17 that Zaydi and Ghaani reached an agreement to allow unspecified Popular Mobilization Forces (PMF) units and security forces to enter Jurf al Sakhr in exchange for Kataib Hezbollah's withdrawal from the area.[13] The Iraqi federal government has not confirmed the existence of this agreement at the time of this writing. Kataib Hezbollah has controlled Jurf al Sakhr since 2014 and has denied the Iraqi federal government access to the area for over a decade.[14] Ghaani had arrived in Baghdad on November 16 to mediate between the Iraqi federal government and Kataib Hezbollah after Zaydi ordered Iraqi security forces, including the Counter Terrorism Service, to enter Jurf al Sakhr if Kataib Hezbollah did not withdraw from the area by November 20.[15] This demand came after the Iraqi government announced on November 14 that its investigative committee had found evidence to support claims of Kataib Hezbollah's involvement in oil smuggling in Jurf al Sakhr.[16] A leaked Iraqi Interior Ministry report recently revealed how Kataib Hezbollah has generated millions of dollars in illicit revenue from oil smuggling in the Jurf al Sakhr area since 2021.[17]

Zaydi likely attempted to reach this agreement with Ghaani to balance his attempts to constrain Iranian-backed Iraqi militias with avoiding armed conflict with Kataib Hezbollah. Zaydi met with Ghaani after unspecified framework officials conveyed a likely Kataib Hezbollah threat to conduct drone and missile attacks targeting the Green Zone in Baghdad City if Iraqi security forces "stormed" Jurf al Sakhr during a November 16 framework meeting, according to two sources speaking to US-funded, regional media.[18] Iranian-backed Iraqi militias have historically attacked and threatened to attack the Green Zone, which hosts the US Embassy and other Iraqi federal government buildings, in order to pressure the government to act in accordance with militia interests.[19] Kataib Hezbollah previously vowed on November 12 and 16 to confront any Iraqi security force that enters Jurf al Sakhr without obtaining the militia's permission.[20] Zaydi's attempt to pressure Kataib Hezbollah into withdrawing from Jurf al Sakhr comes after he has taken numerous actions in recent months to constrain Iranian-backed Iraqi militias, including by attempting to disarm them and disrupt their illicit economic

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activities.[21] These actions are likely related to US pressure as well as his desire to increase his own personal power as prime minister, which illicit militia operations undermine.[22] Kataib Hezbollah's threats, combined with Zaydi's recent efforts to constrain Iranian-backed Iraqi militias, probably motivated him to reach an agreement to allow a limited Iraqi government presence in Jurf al Sakhr. Previous Iraqi administrations have also unsuccessfully attempted to constrain Iranian-backed Iraqi militias.[23] Kataib Hezbollah, or at least part of the organization (see more below), is likely to exploit any agreement that attempts to undermine their interests in Iraq.

The Shia Coordination Framework is also reportedly attempting to mediate between the Iraqi government and Kataib Hezbollah for reasons that both align with and differ from Zaydi's. The framework likely shares Zaydi's aim to avoid an armed confrontation between Kataib Hezbollah and Iraqi government forces but also seeks to remain involved in important negotiations. An informed political source told Iraqi media on November 17 that unspecified framework leaders will meet with Ghaani to discuss a proposed resolution to the Jurf al Sakhr issue.[24] The framework's expected meeting with Ghaani comes after Zaydi and Ghaani reportedly reached an agreement regarding Jurf al Sakhr, which suggests that Zaydi did not involve the framework during his earlier negotiations with Ghaani. This comes after Zaydi previously sidelined framework leaders from engaging in disarmament negotiations with Iranian-backed Iraqi militias.[25]

Some Kataib Hezbollah members, especially those close to Secretary General Abu Hussein al Hamidawi, will very likely try to confront any security force that attempts to enter Jurf al Sakhr or otherwise undermine any agreement that requires Kataib Hezbollah's withdrawal from Jurf al Sakhr. Hamidawi and senior Kataib Hezbollah official and Popular Mobilization Forces (PMF) Chief of Staff Abdul Aziz al Muhammadawi, aka Abu Fadak, have had a rivalry over control of Kataib Hezbollah since 2020, but the recent standoff with the Iraqi government over Jurf al Sakhr appears to have exacerbated those internal divisions.[26] Hamidawi remains opposed to allowing any Iraqi government presence in Jurf al Sakhr, while Abu Fadak reportedly supported reaching an understanding with Zaydi to allow limited Iraqi government presence over some areas of Jurf al Sakhr.[27] Kataib Hezbollah members aligned with Hamidawi could thus undermine any attempt by the federal government and Abu Fadak to mediate between Zaydi and Kataib Hezbollah. Increasing tensions between Abu Fadak and Abu Hussein could also exacerbate the militia's command and control issues. An informed source told Iraqi media on November 16 that lower-level commanders are not getting clear direction from either Abu Fadak or Abu Hussein due to the worsening tensions.[28]

US and Partner Military Operations

Nothing significant to report.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

Iran has continued targeting US military radar systems in Bahrain amid US strikes on Iranian

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air defense infrastructure on Qeshm Island. The IRGC claimed that it struck a US military radar system at Sheikh Isa Air Base in Bahrain on November 17 in response to US military activity and alleged violations of Iranian airspace.[29] US Central Command (CENTCOM) denied that the strike hit US military equipment and stated that US forces intercepted multiple Iranian drones that Iran launched toward Bahrain.[30] The IRGC previously claimed that it targeted US radar systems in Bahrain on November 13 and 15.[31] Iran likely targets US radars to degrade US early-warning and air defense capabilities and complicate US efforts to protect military facilities in the Persian Gulf.[32] IRGC Spokesperson Brigadier General Hossein Mohebbi also implied on November 17 that Bahrain's cooperation with US military operations against Iran, reliance on US security guarantees, and treatment of Shia religious authorities have led to Iran's attacks on Bahrain.[33] Iran's attacks come amid US strikes on Qeshm Island.[34] A US military official confirmed to Western media that US forces struck a missile launch site on Qeshm Island on November 17.[35] The United States also previously struck Iranian air defense systems on Qeshm Island on November 6.[36]



US-Iran Negotiations

Nothing significant to report.

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Iranian Domestic Affairs

See topline section.

Lebanon

Nothing significant to report.

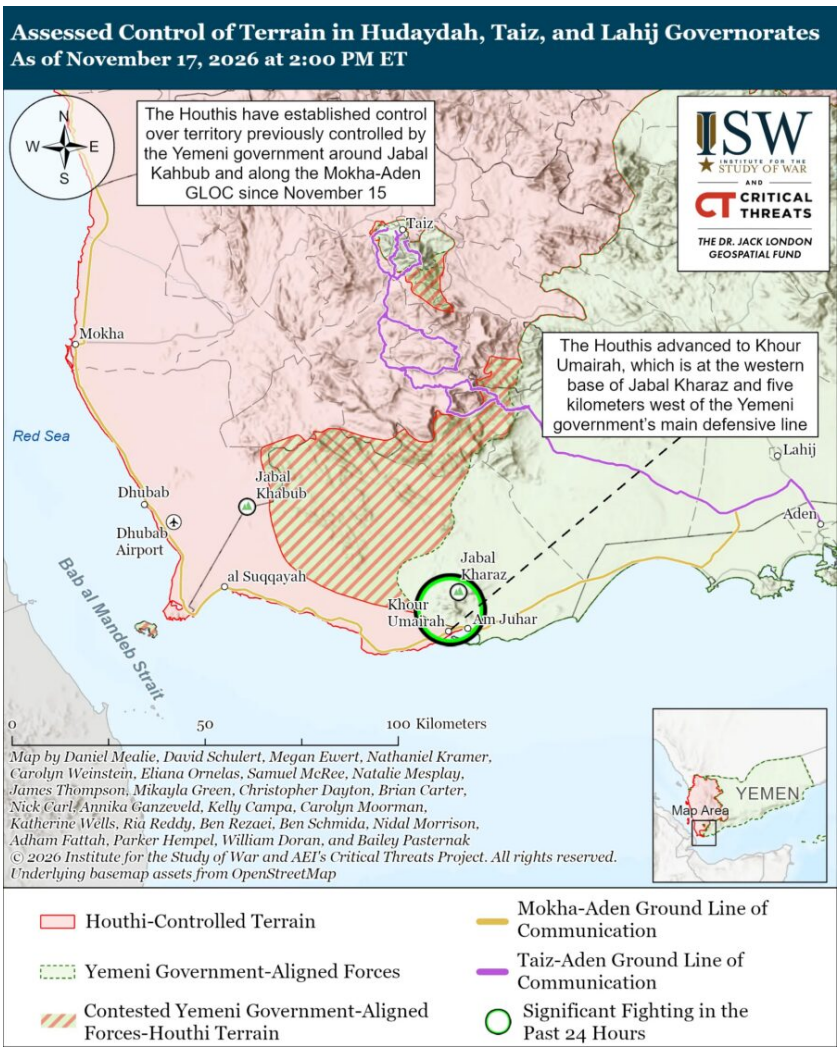
Iraq

See topline section.

Arabian Peninsula

The Houthis are continuing to claim that the Bab al Mandeb Strait remains open to international traffic. Houthi territorial gains along Yemen's Red Sea coast and the Gulf of Aden since November 15 could allow the Houthis to more easily target international shipping. Houthi military spokesperson Yahya Sarea claimed on November 17 that the strait is "safer" now that Houthi forces have seized additional territory along the Bab al Mandeb Strait and Red Sea coast in recent days (see below).[37] Allowing the Houthis to establish control over this newly seized territory risks causing long-term economic disruption for the United States and its partners. Insurance rates are unlikely to return to pre-crisis levels for a substantial period of time once a crisis ends.[38]

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The Houthis have continued to seize territory along the Gulf of Aden that could provide the group with advantageous terrain to attack the positions of Yemeni government-aligned forces. The Houthis have continued to advance and consolidate control over previously Yemeni government-controlled territory along Yemen's Red Sea Coast and the Gulf of Aden since Yemeni government-aligned forces withdrew to new defensive positions on November 15.[39] A Houthi military commentator and an independent Yemeni journalist reported in recent days that Houthi forces seized control of territory around Jabal Kahbub on November 15.[40] Jabal Kahbub is a mountainous area approximately 30 kilometers north of Houthi positions along the Red Sea coastal plain near the Bab al Mandeb Strait. Houthi-appointed Lahij Governor Ahmed Jareeb inspected Houthi fighters on November 17 in Khour Umairah, located along the Mokha-Aden ground lines of communication (GLOC).[41] Geolocated footage from November 16 and 17 also shows Houthi fighters at a former Yemeni government military site in Khour Umairah.[42] These reports indicate that the Houthis have established effective control along the Mokha-Aden GLOC that runs along a coastal highway from the previous Houthi positions in al Aradi, located roughly 75 kilometers west of Khour Umairah.[43]

Yemeni government-aligned forces have begun to establish new defensive positions near Jabal Kharaz on November 15 and 16, after withdrawing from the Red Sea coastal plain.[44] Jabal Kharaz is located immediately south of Khour Umairah and is about 80 kilometers east of the Bab al Mandeb Strait and 100 kilometers west of Aden City (see map).

The Houthis are now at Jabal Kharaz. The Houthi capture of Jabal Kharaz would mark the capture of the last defensible position between Kharaz and Aden City. Am Juhar is located about five kilometers east of

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Houthi positions in Khour Umairah. The Houthis have not yet accomplished this objective at the time of this writing. The consolidation of Houthi control over the Red Sea coastal plain and Gulf of Aden would allow the Houthis to protect the Houthis' rear flank and exploit the porous frontline between the Taiz-Aden and Mokha-Aden GLOCs as the group advances toward Aden City.

Saudi close air support (CAS) could help Yemeni government-aligned forces prevent the Houthis from establishing control over Jabal Kharaz and advancing further east down the relatively exposed Mokha-Aden GLOC and flat terrain in Aden Governorate.[45] The Yemeni government would need to hold defensive positions at Kharaz for a combination of airpower and ground forces to successfully stop Houthi attacks over open ground, however.

Yemeni government-aligned forces have continued to claim advances in Jawf and northwestern Marib governorates toward Jawf Governorate's capital city, al Hazm. Yemeni government-aligned forces have continued to engage Houthi forces in Jawf and northwestern Marib governorates since November 16.[46] These engagements are likely part of a shaping operation to recapture al Hazm City.[47] The Yemeni government-aligned forces' efforts to recapture al Hazm City are likely intended to primarily protect Yemeni-government controlled territory in Jawf and Marib governorates from future Houthi advances. Al Hazm City is located at the nexus of two key road networks that allow for expedited movement into both Jawf and Marib governorates, which the Houthis previously exploited in 2020 to launch offensives on both governorates.[48]

It is possible that the Yemeni government advances in Jawf and Marib governorates are also intended to secondarily draw Houthi forces away from other fronts in Yemen, such as Lahij and Taiz, due to the proximity of Jawf and Marib governorates to Houthi-controlled territory in Sanaa Governorate.[49] ISW-CTP has not yet observed any indicators that the Houthis have redeployed significant forces to Jawf and Marib governorates as the Yemeni government-aligned forces advanced in these areas.

The Houthi movement claimed that it struck Saudi critical infrastructure and an early warning radar on November 16-17 as part of its ongoing campaign to compel Saudi Arabia to end military operations in Yemen and accept Houthi demands. Houthi spokesperson Yahya Saree claimed on November 17 that the Houthis struck two pumping stations along the East-West Pipeline in Riyadh Province with drones.[50] The Houthis have targeted and struck the East-West Pipeline on multiple occasions throughout the conflict.[51] A previous Houthi attack on the East-West Pipeline in September 2026 forced Saudi authorities to close the pipeline for approximately 11 days to conduct emergency repairs.[52] The Houthis also claimed that the group attacked a Saudi early warning radar installation in Sharurah, Najran Province, with drones.[53] The Houthis movement's targeting of early warning radar installations also suggests that the Houthis are attempting to disrupt Saudi forces' ability to detect and respond to attacks in southwestern Saudi Arabia. ISW-CTP cannot verify that any of the Houthis' claimed attacks on November 16-17 occurred at the time of this writing. The Houthis seek to impose economic and political costs on Saudi Arabia to compel the kingdom to submit to Houthi demands, which include ending Saudi support for Yemen's legitimate government, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[54]

Saudi Joint Forces Command Spokesperson Major General Turki al Maliki separately announced on November 17 that Saudi air defenses intercepted a Houthi drone near Riyadh.[55] The Houthis have not claimed this attack since CTP-ISW's last data cutoff on November 17, however.

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Iran Update, November 18, 2026

Benjamin Schmida, Ben Rezaei, Kinser Rafert, William Doran, Kelly Campa

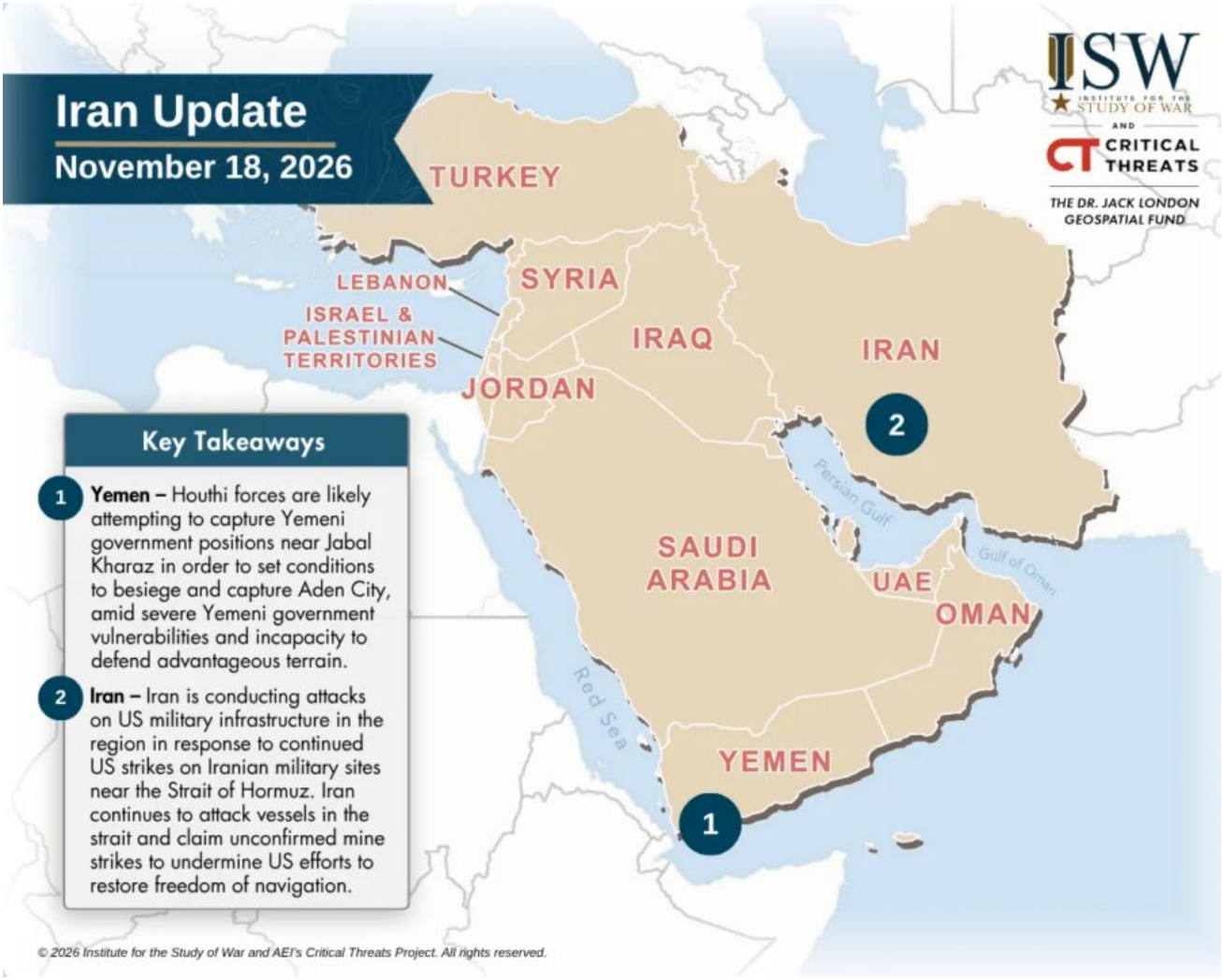
Analyst Notes: Data Cutoff: 2:00 PM ET

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. Houthi forces are likely attempting to capture Yemeni government positions on advantageous terrain near Jabal Kharaz, which supports Houthi efforts to establish control over Lahij Governorate and set conditions to besiege and capture Aden City. The Yemeni government's failure to hold a highly defensible position near Jabal Kharaz indicates that government-aligned forces are incapable of mounting an effective defense in southern Lahij Governorate.
2. Iran is conducting near-daily attacks on US military infrastructure in the region in response to continued US strikes on Iranian military sites near the Strait of Hormuz. Iran also continues to attack commercial vessels in the strait and claim that vessels are striking mines in the strait's shipping lanes in order to undermine US efforts to ensure freedom of navigation.

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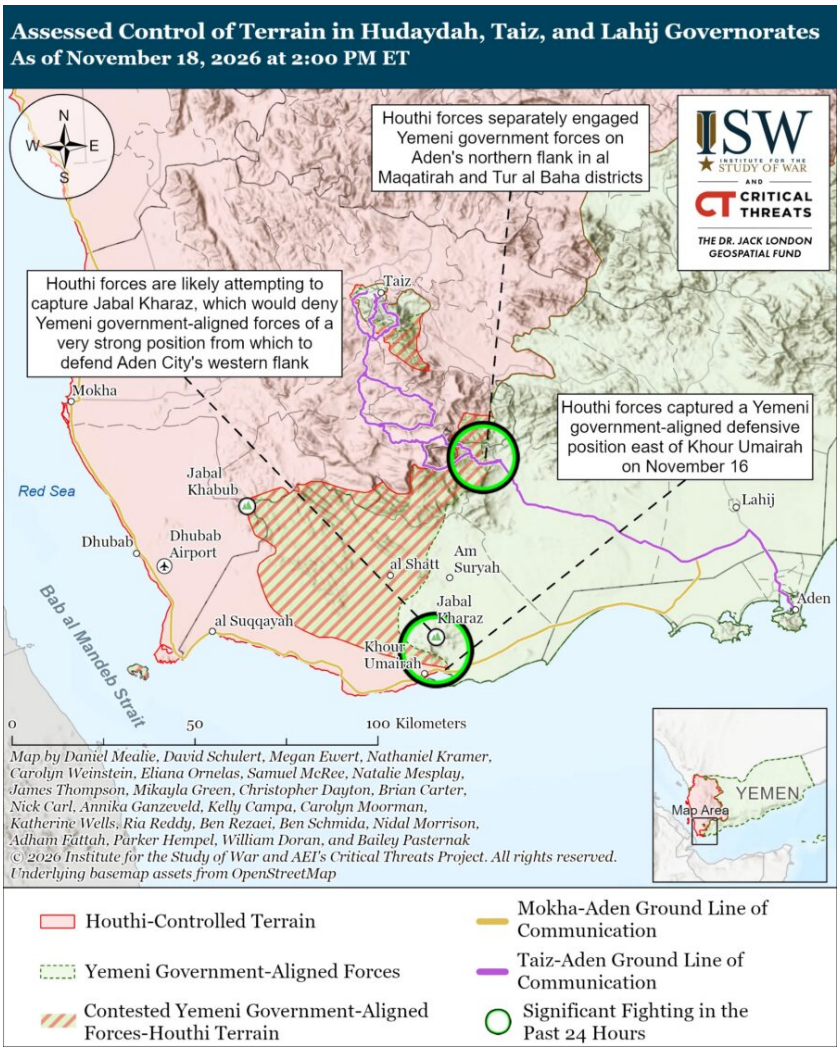
Toplines

Houthi forces are likely attempting to capture Yemeni government positions on advantageous terrain near Jabal Kharaz, which supports Houthi efforts to establish control over Lahij Governorate and set conditions to besiege and capture Aden City. Geolocated footage showed that Houthi forces captured a Yemeni government defensive position east of Khour Umairah and south of Jabal Kharaz, along the Mokha-Aden ground line of communication (GLOC) in Lahij Governorate, on November 16.[1] The footage, along with commercially available satellite imagery, indicates that Houthi forces likely conducted ballistic missile strikes on the position before capturing it.[2] The Houthis have often fired ballistic missiles targeting Yemeni government positions and staging areas to weaken and disorganize defending forces before attempting to maneuver.[3]

A Houthi capture of Jabal Kharaz would deny Yemeni government-aligned forces a very strong position along the Mokha-Aden coastal road from which to defend Aden City's western flank. Jabal Kharaz's position near the Gulf of Aden and its surrounding terrain should allow Yemeni government-aligned forces to canalize advancing Houthi forces further eastward to narrow lines of advance north or south of the mountain, provided that government-aligned forces are capable of mounting a tactical defense. Houthi forces and commanders would be forced to choose between advancing either along a two-kilometer-wide strip of beach along the Mokha-Aden GLOC to the south of Jabal Kharaz, or along a narrow valley road that connects al Shatt to Am Surayh to the north of Jabal Kharaz. Houthi advances along either or both of these routes simultaneously would render Houthi forces extremely vulnerable to Yemeni government

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spotting and fire from elevated positions on Jabal Kharaz that should, in theory, prevent further Houthi advances. The Houthis' capture of the Yemeni government-aligned defensive position east of Khour Umairah on November 16 could indicate that government-aligned forces are unable or unwilling to effectively defend Jabal Kharaz and the Mokha-Aden GLOC.[4]



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

Houthi forces separately engaged Yemeni government forces on Aden's northern flank in al Maqatirah and Tur al Bahah districts. Several anti-Houthi Yemeni sources reported that Houthi fighters engaged Yemeni government-aligned forces in northern Lahij Governorate's al Maqatirah and Tur al Bahah districts on November 17 and 18, which suggests that Houthi forces are simultaneously attempting to advance on Aden's northern and western flanks.[5] An anti-Houthi Yemeni source also reported that Yemeni government-aligned forces captured two Houthi fighters who attempted to infiltrate al Raja, which lies approximately 45 kilometers south of the al Maqatirah frontline and 50 kilometers north of Aden City.[6] The infiltration highlights that the Yemeni government-aligned forces remain highly vulnerable to overextension and infiltration through a wide, exposed rear area, particularly because Houthi fighters can fix Yemeni government-aligned forces along frontlines while infiltrating their rear.

US and Partner Military Operations

See "Iranian Strike Campaign" section below.

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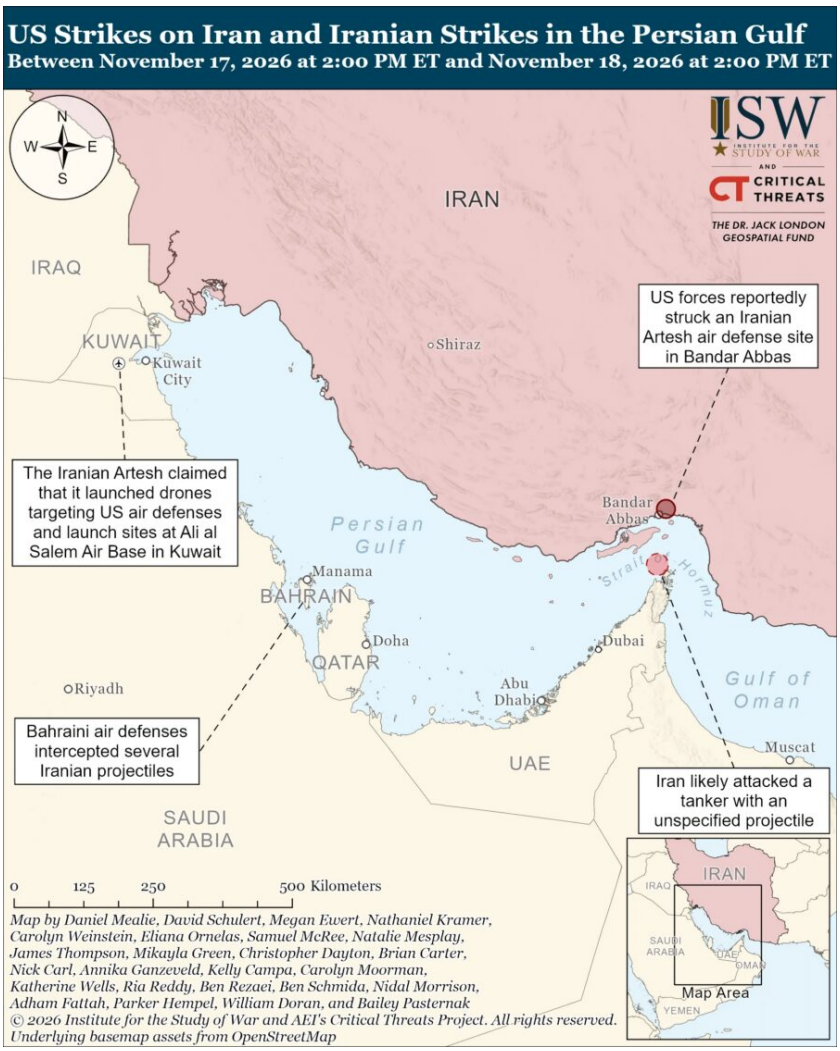
Iranian Strike Campaign

Assessed Iranian War Aims:

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

Iran is conducting near-daily attacks on US military infrastructure in the region in response to continued US strikes on Iranian military sites near the Strait of Hormuz. Two unspecified US officials told NBC News on November 17 that US forces have recently conducted discreet attacks on Iranian military sites and that Iran has responded by attacking US military sites nearly every day.[7] The officials said that the Pentagon has not publicly acknowledged most strikes and that US forces often target missile launchers and other systems that Iranian forces use to attack vessels and Gulf states.[8] An unspecified US military official added that US aircraft struck an Islamic Revolutionary Guards Corps (IRGC) missile launch site on Qeshm Island on November 17 after Iran targeted a US radar in Bahrain.[9] Iran also attacked Kuwait and Bahrain again the following day. The Iranian Artesh claimed that its drones targeted Patriot air defense systems and drone and missile launchers at Ali al Salem Air Base on November 18.[10] The Kuwaiti Army General Staff announced that Kuwaiti air defenses intercepted the Iranian drones, however.[11] The Bahrain Defense Force separately said on November 18 that its air defenses repelled several Iranian aerial attacks.[12] Iranian attacks on US military infrastructure in the region are part of an Iranian regional campaign that aims to weaken the resolve of the United States — and its regional allies that host US troops — to continue the war.

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Iranian forces also continue to attack commercial vessels in the Strait of Hormuz and claim that these vessels are striking mines in the strait's southern transit route in order to undermine US operations to ensure safety for civilian maritime traffic. United Kingdom Maritime Trade Operations (UKMTO) reported that an unknown projectile struck a tanker 13 nautical miles north of Khasab, Oman, in the Strait of Hormuz on November 17.[13] The IRGC Navy claimed on November 18 that a vessel struck a naval mine and exploded along an unauthorized route through the Strait of Hormuz.[14] ISW-CTP has not observed any indicators that Iran has successfully re-mined the southern route.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

The Iranian regime appears to be expanding domestic intelligence and counterinsurgency efforts amid continued anti-regime militant activity in northwestern and southeastern Iran. Islamic Development Organization (IDO)-affiliated Mehr News Agency argued in an op-ed on November 18 that concurrent activities by anti-regime groups in these regions could reflect a coordinated effort to "disperse" Iranian security forces across several hotspots.[15] The op-ed urged authorities to monitor

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and investigate any connections between separate incidents in both regions and to treat Iran's information domain as a "military field."[16] The op-ed's publication indicates an effort by some elements of the regime to frame separate incidents of anti-regime unrest as part of a broader, externally organized pressure campaign that is designed to overwhelm internal security forces and weaken the regime's ability to respond. Basij Commander Hossein Taeb separately called on November 18 for Basij bases to strengthen their neighborhood intelligence networks and mobilize residents to identify militant and espionage networks in their communities.[17] Taeb's remarks corroborate Iranian Supreme Leader Mojtaba Khamenei's August 10 directive to make "every Iranian a Basiji" and strengthen domestic intelligence and informant networks through training and modern technology.[18] The regime likely seeks to expand local Basij networks to provide early warning for formal security forces and reduce the strain of simultaneous militant threats on these forces.

Iranian security forces have recently conducted several counterinsurgency operations targeting anti-regime Kurdish groups in northwestern Iran.[19] The Iranian Ministry of Intelligence said on November 17 that it dismantled two armed "separatist" cells in Kurdistan Province, arrested nine members, and seized several rifles, ammunition, and 70 Starlink devices.[20] Kurdistan Province border guards separately announced on November 17 that they seized 21 firearms near Baneh, Kurdistan Province.[21] Iranian media also reported that Kurdish Free Life Party (PJAK) fighters killed one border guard near Baneh on November 17.[22] These anti-regime activities have likely reinforced regime concerns about militant networks and weapons trafficking along Iran's northwestern border.

Anti-regime militant activity has also continued in southeastern Iran in recent days.[23] Iranian media reported on November 18 that unspecified armed militants killed a local Sunni Basij member in Zahedan, Sistan and Baluchistan Province.[24] No group has claimed responsibility for the attack at the time of this writing. The attack comes amid an uptick in insurgent activity by the Mobarizoun Popular Front (MPF), a coalition of Baloch anti-regime groups, in southeastern Iran. MPF fighters have recently conducted attacks using small arms and improvised explosive devices (IEDs) to target internal security infrastructure and regime forces, including Law Enforcement Command (LEC) posts and purported IRGC Quds Force-controlled Fatemiyoun fighters.[25]

Lebanon

The Lebanese government is likely attempting to thwart Hezbollah's efforts to infiltrate and develop military capabilities in areas of Lebanon beyond its traditional areas of influence. Lebanese Government Commissioner to the Military Court Claude Ghanem charged five suspected Hezbollah members with conspiracy to establish and equip illegal armed groups on November 18.[26] It is unclear whether Ghanem's charges specifically accuse the suspects of arming existing Hezbollah units in the area or creating additional Hezbollah or sympathizer militia cells. Lebanese Internal Security Forces (ISF) personnel previously arrested the five suspects in Bcharre District, in northern Lebanon's Tripoli Governorate, on November 10.[27]The prosecution effort is part of a broader Lebanese government effort to hold Hezbollah accountable for its criminal activities, which began when the ISF confiscated a Hezbollah truck carrying nearly 800 kilograms of high explosives from the Bekaa Valley to Beirut's southern suburbs on October 5.[28] Ghanem's latest charges indicate that the government is continuing to restrict Hezbollah's criminal activities despite the group's political leverage and threats of unrest.[29]

The presence of suspected Hezbollah fighters conducting illegal militant activities in Bcharre District, whose inhabitants are almost entirely Maronite Christian, suggests that Hezbollah is attempting to expand its operations beyond its traditional, Shia-majority operational areas in southern Lebanon, the Bekaa Valley, and Beirut's southern suburbs.[30] Hezbollah fighters may seek to conceal weapons caches

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in Bcharre District and other rural Christian areas to avoid exposure to Israeli airstrikes or Lebanese government interdictions.[31] Hezbollah also very likely maintains some smuggling routes through northwestern Lebanon's Akkar and Tripoli governorates, which it may increasingly depend upon to circumvent Lebanese authorities operating along the Beirut-Damascus Highway from the Bekaa Valley to Beirut.[32] It is also possible, albeit less likely, that the suspects sought to develop non-Shia militant cells that Hezbollah could attempt to leverage as a future threat to the Lebanese government's efforts to disarm the group. Hezbollah has long equipped and organized an auxiliary, non-denominational militia called the Lebanese Resistance Brigades, but it is very unlikely that many members of Bcharre District's overwhelmingly Maronite population are willing to organize armed cells subservient to Hezbollah.[33]

Iraq

Nothing significant to report.

Arabian Peninsula

The Houthi movement likely launched missiles and drones targeting Saudi critical infrastructure on November 17 and 18 as part of its ongoing campaign to compel Saudi Arabia to end military operations in Yemen and submit to the Houthis' economic demands. Saudi Joint Forces Command Spokesperson Major General Turki al Maliki announced that Saudi air defenses intercepted three Houthi cruise missiles and drones near Riyadh and one Houthi drone over southern Saudi Arabia on November 17 and 18.[34] The Houthis have not claimed any attacks on Saudi Arabia since ISW-CTP's last data cutoff on November 17, however. The Houthis seek to impose economic and political costs on Saudi Arabia in order to compel the kingdom to submit to Houthi demands, which include ending Saudi support for Yemen's legitimate government, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[35]

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Iran Update, November 19, 2026

Carolyn Moorman, Adham Fattah, Parker Hempel, Bailey Pasternak, Kinser Rafert, Katherine Wells, Annika Ganzeveld

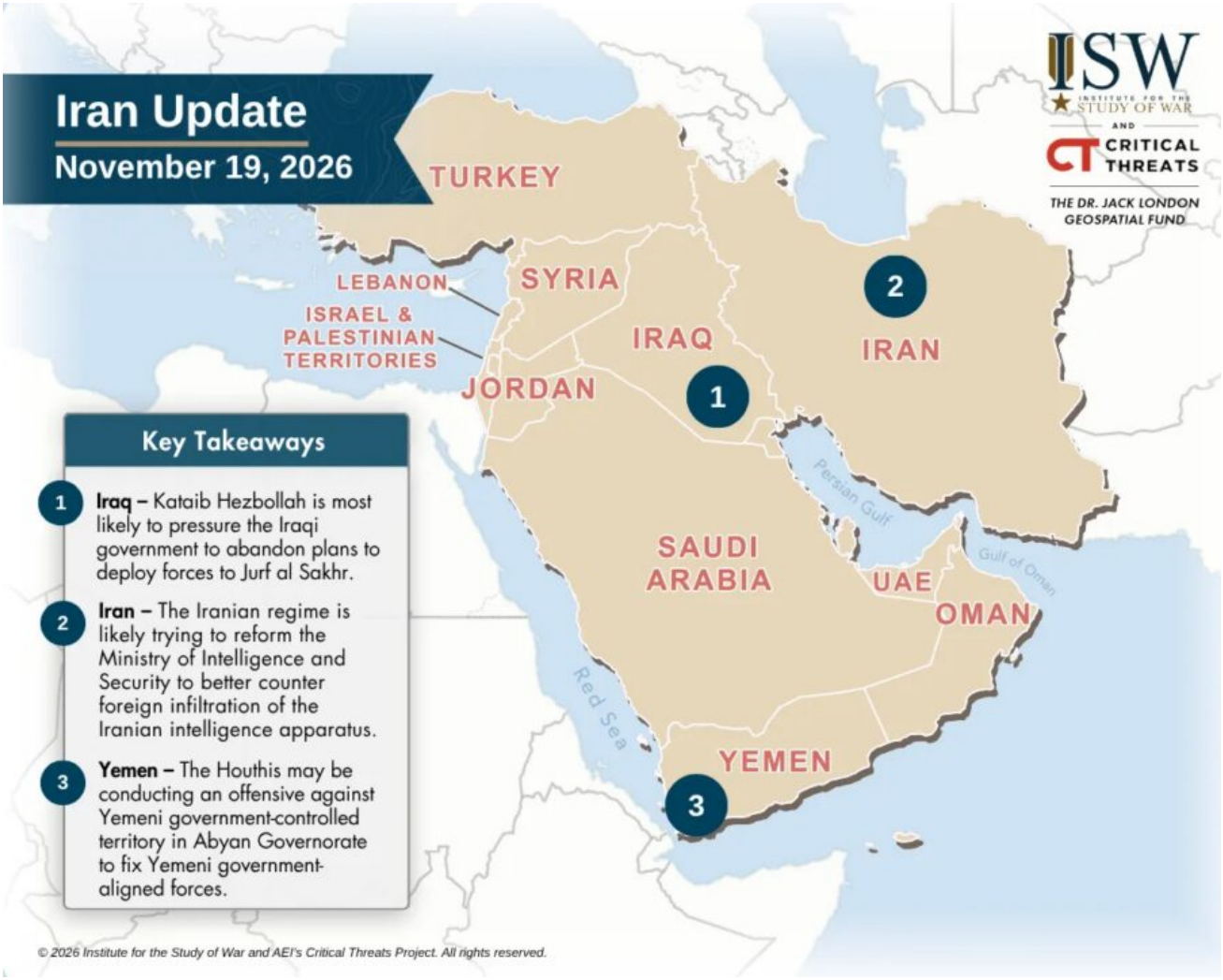
Analyst Notes: Data Cutoff: 2:00 PM ET

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

Key Takeaways

1. ISW-CTP is considering three possible courses of action (COAs) that the Iranian-backed Iraqi militia Kataib Hezbollah could take in response to the Iraqi federal government's demand for the militia to withdraw from Jurf al Sakhr.
2. In the most likely course of action, Kataib Hezbollah will attempt to coerce Zaydi to abandon his plans to deploy Iraqi military forces to Jurf al Sakhr. A less probable COA is for Kataib Hezbollah to sign an agreement with the Iraqi federal government that would likely include at least a partial Kataib Hezbollah withdrawal from Jurf al Sakhr. The most dangerous COA would include armed confrontation between Kataib Hezbollah and the Iraqi federal government.
3. The Iranian regime is likely trying to reform the Ministry of Intelligence and Security by proposing the removal of the religious requirement for the intelligence minister position and the creation of separate counterintelligence and ideological-political organizations within the ministry in order to better counter foreign infiltration of the Iranian intelligence apparatus.
4. The Houthis may be conducting an offensive against Yemeni government-controlled territory in Abyan Governorate to fix Yemeni government-aligned forces that could reinforce other Yemeni government-aligned forces currently defending Aden City, the de facto Yemeni capital. The Houthis may also be opening an additional front from which to threaten Aden City.

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Toplines

ISW-CTP is considering three possible courses of action (COAs) that the Iranian-backed Iraqi militia Kataib Hezbollah could take in response to the Iraqi federal government's demand for the militia to withdraw from Jurf al Sakhr. Kataib Hezbollah has controlled Jurf al Sakhr since 2014 and has denied the Iraqi federal government access to the area for over a decade.[1] Kataib Hezbollah's tensions with Baghdad follow the recent leak of a "top-secret" Iraqi Interior Ministry report detailing how Kataib Hezbollah has generated millions of dollars in illicit revenue from oil smuggling in Jurf al Sakhr since 2021.[2] Iraqi Prime Minister Ali al Zaydi called for Kataib Hezbollah to withdraw from Jurf al Sakhr after a government committee's investigation into the oil smuggling proved Kataib Hezbollah's involvement.[3] Iraqi security forces, including units from the Iraqi Army, the Iranian-backed Popular Mobilization Forces (PMF), and the Federal Police, are prepared to deploy to Jurf al Sakhr at 22:00 ET on November 19 if Kataib Hezbollah does not withdraw by then.[4] Kataib Hezbollah may respond to this government pressure through the COAs outlined below.

In the most likely course of action (MLCOA), Kataib Hezbollah will attempt to coerce Zaydi to abandon his plans to deploy Iraqi military forces to Jurf al Sakhr. Kataib Hezbollah Secretary General Abu Hussein al Hamidawi said in a November 19 statement that the militia would settle its issues with the federal government via "private channels" and that Kataib Hezbollah members should return to their "normal activities."[5] Hamidawi's objection to any federal government presence in Jurf al Sakhr suggests that Kataib Hezbollah will attempt to coerce Baghdad, either via the use or threat of force, to

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abandon its plan to enter Jurf al Sakhr during the militias' "private" discussions with the government.[6] Iranian-backed Iraqi militias have historically used force, and the threat of force, to compel the Iraqi government to act in line with militia aims.[7] A Kataib Hezbollah spokesperson also rejected on November 19 Kataib Hezbollah's withdrawal from Jurf al Sakhr, noting that the militia won't leave the area even if an agreement is reached with the government.[8] The spokesperson may have been referring to attempts by Islamic Revolutionary Guards Corps (IRGC) Quds Force Commander Brigadier General Esmail Ghaani and other Iranian-backed Iraqi actors to mediate between Kataib Hezbollah and the government (see more below).[9] Iran could support Kataib Hezbollah's attempts to coerce the government to back down, depending on Kataib Hezbollah's actions and the potential for further escalation. Iranian-backed Iraqi actors have demonstrated their ability to successfully pressure Zaydi to abandon efforts to challenge militia interests, such as his plans for Iraqi security forces to enter Jurf al Sakhr in August 2026.[10]

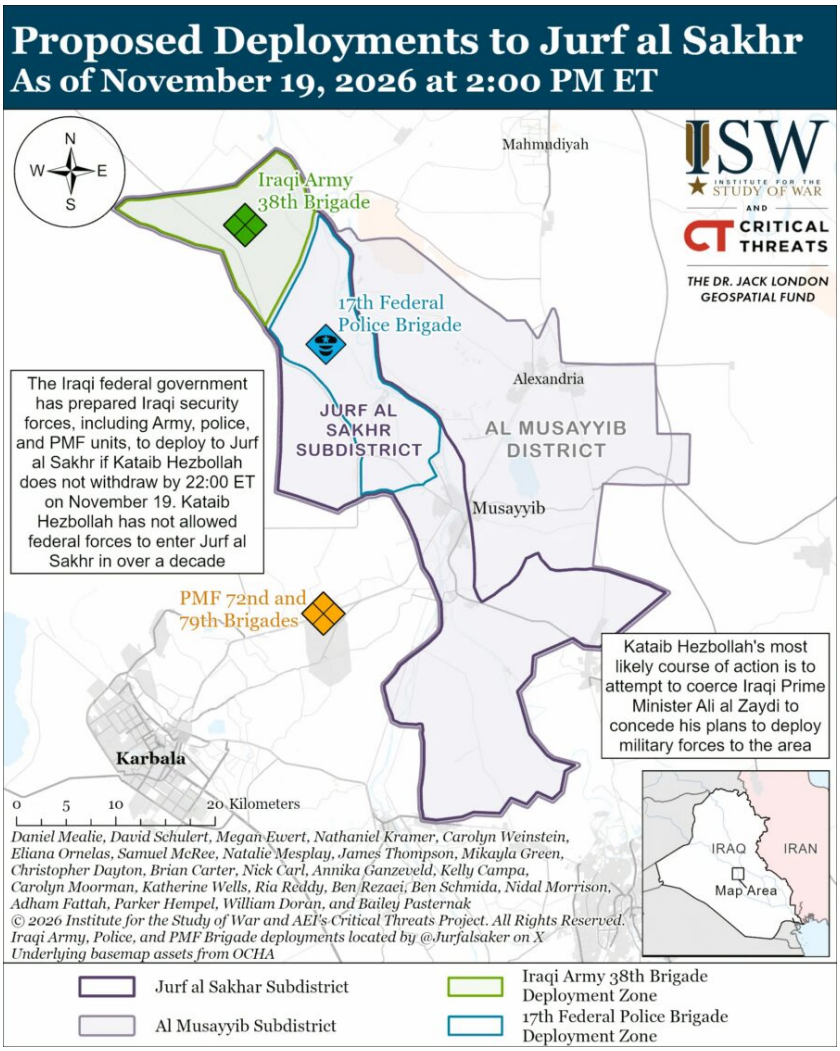
It is unclear if Zaydi will yield to Kataib Hezbollah's coercion efforts, given that he has consistently demonstrated in recent months his resolve to counter Iraqi militias. The United States has pressured Zaydi to crack down on Iraqi militias, including Kataib Hezbollah, which has pushed him to try to constrain the militias in recent months.[11] A Shia Coordination Framework source told Iraqi media on November 18 that Zaydi and US Envoy to Iraq and Syria Tom Barrack talk every day.[12] A US State Department spokesperson said on November 18 that the United States expects Baghdad to hold Iraqi militias accountable for undermining Iraqi sovereignty.[13] ISW-CTP also continues to assess that Zaydi's ambitions to increase his power as prime minister have also motivated his efforts against the militias.[14] The public nature of the oil smuggling report that precipitated this current situation also increases pressure on Zaydi to not back down from his demands for at least a partial Kataib Hezbollah withdrawal from Jurf al Sakhr.

A less probable COA is for Kataib Hezbollah to sign an agreement with the Iraqi federal government that would likely include at least a partial Kataib Hezbollah withdrawal from Jurf al Sakhr. Three senior Iraqi security officials claimed to Reuters on November 19 that the Iraqi federal government and Kataib Hezbollah had reached an agreement.[15] A member of the Badr Organization's Political Bureau similarly told Iraqi Kurdish media on November 18 that Ghaani and Zaydi reached a written draft agreement to redeploy some Kataib Hezbollah forces from Jurf al Sakhr and allow government forces into the area.[16] This Badr Organization member probably received information on the draft agreement through Badr Organization head Hadi al Ameri, who has been involved in mediation efforts between Zaydi and Kataib Hezbollah.[17] The Badr Organization member specified that two out of three of the Kataib Hezbollah brigades currently based in Jurf al Sakhr would deploy to al Qaim, near the Iraq-Syria border, and that one Kataib Hezbollah brigade would stay in Jurf al Sakhr.[18] It is notable that Zaydi would reportedly make a deal to deploy Kataib Hezbollah members to the Iraq-Syria border, as he is in the process of transferring security responsibilities in multiple areas along the border, including al Qaim, from the PMF to the Iraqi Army and Interior Ministry.[19] Kataib Hezbollah-affiliated PMF brigades have controlled al Qaim and several areas of the Iraq-Syria border for years.[20]

Zaydi and Ghaani likely tried to craft the agreement in a way that would make it palatable for Kataib Hezbollah. The Office of the Commander-in-Chief of the Armed Forces announced on November 19 that the Federal Police will lead the military headquarters responsible for commanding all security forces operating in Jurf al Sakhr, which will include Iraqi Army, PMF, and Energy Police forces.[21] The PMF will deploy the 72nd and 79th brigades, both of which Popular Mobilization Commission Chairman Faleh al Fayyadh specifically requested.[22] The Popular Mobilization Commission is the PMF's administrative body.[23] An Iraq analyst noted on November 18 that the 72nd PMF Brigade is affiliated with Kataib Hezbollah, which suggests that Iranian-backed Iraqi actors picked these specific PMF brigades to appease Kataib Hezbollah and convince it to accept the plan.[24] The plan's partial withdrawal —

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instead of full withdrawal — of Kataib Hezbollah forces from Jurf al Sakhr may also be intended to appease Kataib Hezbollah.



Any agreement between Kataib Hezbollah and the federal government would depend on Ghaani's ability to force Kataib Hezbollah's hand, given Hamidawi's refusal to allow federal forces into Jurf al Sakhr. Ghaani has previously successfully pressured Iraqi militias to take actions against their wishes. Ghaani's intervention in January 2024 caused Iraqi militias to stop attacking US forces in Iraq and Syria during the October 7 War after a Kataib Hezbollah attack killed three US service members in Jordan, for example.[25] Iranian demands for Kataib Hezbollah to even partially withdraw from Jurf al Sakhr may require additional leverage, however, due to the importance Kataib Hezbollah attaches to the area. Jurf al Sakhr's location benefits the militia as it is between Baghdad City and Karbala City, which provides the militia access to smuggling routes. The location is also close enough to Baghdad City for militia members to travel easily to the city but far enough that it complicates government efforts to control the area. A Kataib Hezbollah commander said on November 19 that Iraqi security forces would have to enter Jurf al Sakhr "over the bodies" of Kataib Hezbollah members.[26]

Iran could condition its material and financial aid to Kataib Hezbollah on the militia agreeing to a deal with Baghdad. Reports that Iran has suspended its funding to unspecified Iraqi militias due to Iran's increasing economic difficulties could hamper this point of leverage, however.[27] Two unspecified sources told Iraqi Kurdish media on November 18 that Ghaani assured Zaydi that Kataib Hezbollah would withdraw from Jurf al Sakhr peacefully when discussing the plan to replace Kataib Hezbollah-controlled PMF brigades in Jurf al Sakhr with other brigades.[28]

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The most dangerous COA would include armed confrontation between Kataib Hezbollah and the Iraqi federal government. This course of action would assume that Ghaani is unable to pressure Kataib Hezbollah to reach an agreement or engage in negotiations with the government and that Kataib Hezbollah is unable to coerce Zaydi to back down. Kataib Hezbollah official and PMF Chief of Staff Abdul Aziz al Muhammadawi, aka Abu Fadak, has engaged in mediation efforts alongside Ghaani and other Iranian-backed Iraqi actors.[29] ISW-CTP noted on November 17 that the standoff with Baghdad over Jurf al Sakhr appears to have exacerbated Abu Fadak's divisions with Abu Hussein al Hamidawi.[30] Hamidawi remains opposed to allowing any Iraqi federal government presence in Jurf al Sakhr, while Abu Fadak reportedly supports reaching an understanding with Zaydi to allow a limited Iraqi government presence in some areas of Jurf al Sakhr.[31] It is unlikely, however, that these tensions would prevent Kataib Hezbollah members aligned with Abu Fadak from engaging federal government forces if Kataib Hezbollah failed to coerce Zaydi from backing down and the militia entered an armed confrontation with the government. A Kataib Hezbollah spokesperson's rejection of the group's withdrawal from Jurf al Sakhr, combined with a Kataib Hezbollah commander's claim that Iraqi security forces would have to enter Jurf al Sakhr "over the bodies" of Kataib Hezbollah members, suggests that Kataib Hezbollah could engage government forces if the other two courses of action ISW-CTP identified do not occur.[32] Zaydi placed all Iraqi security forces on their highest level of alert and recalled all security forces on leave in preparation for a potential conflict with Kataib Hezbollah.[33] Zaydi could also be using these preparations to pressure Kataib Hezbollah to comply with the government's demands or at least negotiate with the government.

The Iranian regime is likely trying to reform the Ministry of Intelligence and Security (MOIS) in order to better counter foreign infiltration of the Iranian intelligence apparatus. The Iranian Parliament's National Security and Foreign Policy Commission proposed a bill on November 14 to remove the clerical requirement for the intelligence minister position and create separate counterintelligence and ideological-political organizations within the ministry.[34] The MOIS' current structure requires the minister to hold a certain religious qualification (*mujtahid*) in addition to intelligence expertise.[35] The removal of the *mujtahid* qualification would expand the number of candidates the regime could consider for this role and enable the regime to select a qualified minister regardless of their religious credentials. Inept leadership has previously led to security breaches in the regime, such as under former IRGC Intelligence Organization Chief Hossein Taeb, who was dismissed in 2022 following a series of successful Israeli covert operations in Iran.[36]

The bill's creation of counterintelligence and ideological-political organizations is also likely designed to reduce the risk of foreign infiltration. The proposed "Intelligence Protection Organization" would oversee counterintelligence, vetting, and the prevention of leaks to foreign adversaries.[37] The "Ideological-Political Organization" would focus on religious adherence, political affairs, and indoctrination, likely to make MOIS personnel more loyal to the regime and reduce the risk of infiltration.[38] Israel has significantly infiltrated Iran's security apparatus in recent decades. Israeli forces built drones in Iran in the days leading up to the June 2025 12-Day War and killed numerous senior Iranian officials, including former Intelligence Minister Esmail Khatib, across the 12-Day and Spring 2026 40-Day wars, for example.[39]

The regime likely calculates that the existing MOIS structure is insufficient to counter Israeli infiltration. The MOIS has previously conducted counterintelligence and indoctrination efforts through ministry officials who answered to the intelligence minister.[40] The establishment of organizations dedicated to these issues indicates that the ministry is prioritizing reducing infiltration, particularly as the new organizations will likely be allocated government funds and resources to conduct their missions.

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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*

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.

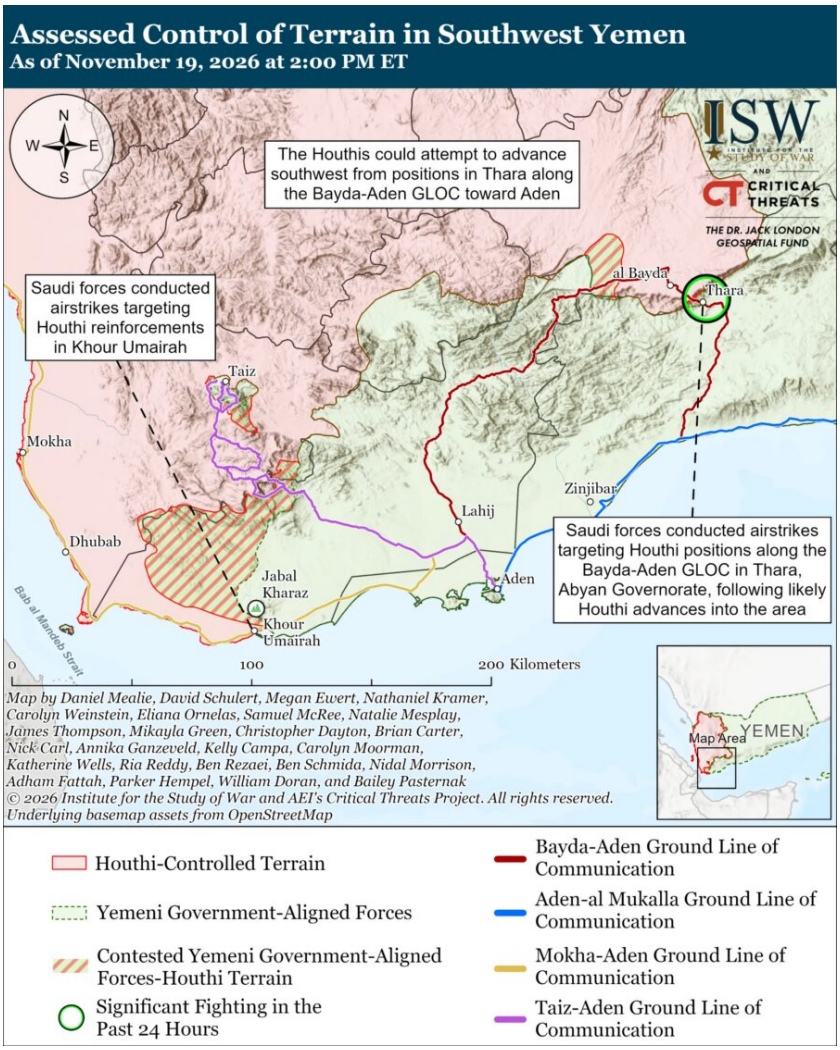
Arabian Peninsula

The Houthis may be conducting an offensive against Yemeni government-controlled territory in Abyan Governorate to fix Yemeni government-aligned forces that could reinforce other Yemeni government-aligned forces currently defending Aden City, the de facto Yemeni capital. The Houthis may also be opening an additional front from which to threaten Aden City. Saudi aircraft recently conducted airstrikes targeting Houthi positions following a Houthi advance near Thara, Abyan Governorate, which is located along the al Bayda-Aden ground line of communication (GLOC), according to an independent Yemeni journalist on November 18.[41] Saudi aircraft also reportedly struck Houthi forces in Mukayras District, al Bayda Governorate, which is roughly five kilometers northwest of Thara.[42] These Houthi forces were likely supporting the Houthi advance into Abyan Governorate.[43]

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The Houthis may seek to fix Yemeni government-aligned forces along the Abyan frontline and prevent these forces from redeploying to counter Houthi advances along the Mokha-Aden and Taiz-Aden GLOCs.[44] Southern Yemeni media reported that Yemeni government-aligned Support and Reinforcement Brigades deployed to Lawdar District, where Thara is located, to prepare for further Houthi attacks in the area on November 19.[45] Support and Reinforcement Brigades forces were recently deployed to reinforce other Yemeni government-aligned factions, including the Southern Giants Brigades and Homeland Shield Forces, in Lahij Governorate for the first time on November 12.[46]

Houthi advances along the al Bayda-Aden GLOC could also represent a Houthi effort to open another front from which the movement could threaten Aden City from the east. It is unlikely that the Houthi advance in Thara will pose an immediate threat to Aden City because current Houthi positions on the al Bayda-Aden GLOC are over 160 kilometers from Aden City. The Houthis would also need to capture multiple larger cities in Abyan Governorate, including Lawdar and Abyan City, from Yemeni government-aligned forces in order to advance southwest toward Aden City.[47] A Houthi offensive along the al Bayda-Aden GLOC could also degrade Yemeni government-aligned forces' and Saudi Arabia's ability to transfer supplies from Yemeni government-controlled eastern governorates, including Shabwa and Hadramawt, to western Yemen.[48]



The Houthi movement claimed that it struck the Saudi Public Investment Fund headquarters and other Saudi critical infrastructure on November 18 and 19 as part of its ongoing campaign to compel Saudi Arabia to end military operations in Yemen and accept Houthi demands. Houthi Spokesperson Yahya Sarea claimed on November 18 and 19 that the Houthis

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conducted several attacks on King Khalid International Airport in Riyadh, King Khalid Air Base in Khamis Mushait, and the King Abdullah Financial District in Riyadh, including an attack on the Saudi Public Investment Fund headquarters.[49] Saudi and international media reported on November 19 that a Houthi missile caused damage to the Saudi Public Investment Fund headquarters.[50] The Houthi movement separately claimed that it attacked a Saudi Petrochemical Company complex in Jubail, Eastern Province, and an unspecified "sensitive target" in Jizan Province.[51] Saudi Joint Forces Command Spokesperson Major General Turki al Maliki confirmed on November 18 and 19 that Saudi air defenses intercepted one Houthi cruise missile near Riyadh and five Houthi ballistic missiles and one cruise missile over southern Saudi Arabia.[52] The Houthis seek to impose economic and political costs on Saudi Arabia to compel the kingdom to submit to Houthi demands, which include ending Saudi support for Yemen's legitimate government, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[53]

The Houthis' attacks on Saudi Arabia come amid US Central Command Commander Admiral Brad Cooper's meetings in Riyadh with Saudi Crown Prince Mohammad bin Salman, Saudi Defense Minister Khalid bin Salman bin Abdulaziz, Saudi Chief of the General Staff and Acting Commander of the Joint Forces General Fayyad Al Ruwaili, and other Saudi military officials.[54] Cooper almost certainly discussed the ongoing Houthi strike campaign on Saudi Arabia in these meetings. The United States is currently providing Saudi Arabia with targeting intelligence to support the Saudi strike campaign on Houthi targets in Yemen.[55]

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Iran Update, November 20, 2026

Ben Rezaei, Nidal Morrison, William Doran, Parker Hempel, Kinser Rafert, Ria Reddy, Kelly Campa

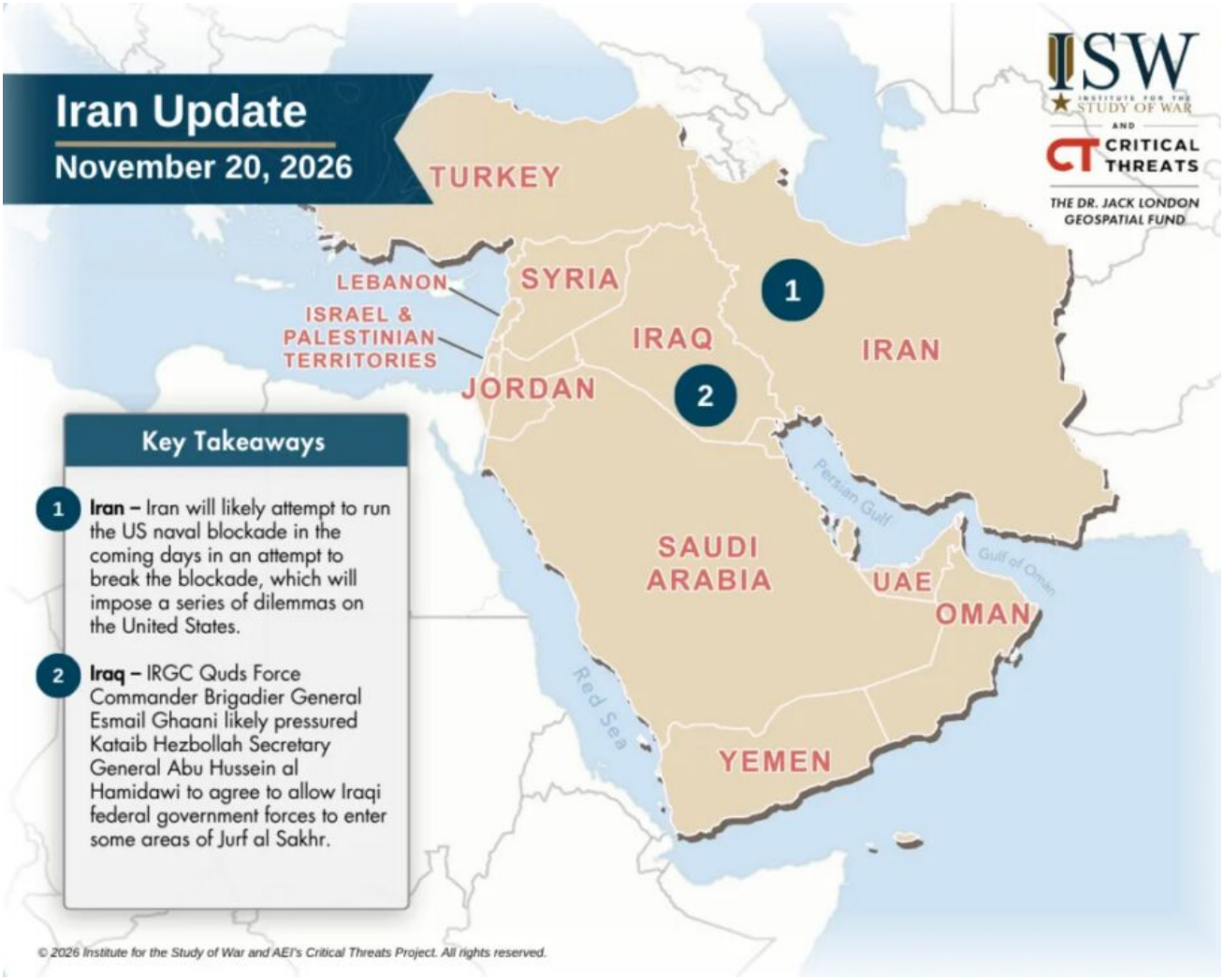
Analyst Notes: Data Cutoff: 2:00 PM ET

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 will likely attempt to run the US naval blockade in the coming days in an attempt to break the blockade. Iranian attempts to run the blockade impose a series of dilemmas on the United States by either collapsing the blockade or returning to a war that imposes unideal political costs on the United States by straining its relationships with Gulf allies.
2. Islamic Revolutionary Guards Corps (IRGC) Quds Force Commander Brigadier General Esmail Ghaani likely pressured Kataib Hezbollah Secretary General Abu Hussein al Hamidawi to agree to allow Iraqi federal government forces to enter some areas of Jurf al Sakhr, Babil Province. It is unclear whether Kataib Hezbollah has withdrawn its forces from any areas of Jurf al Sakhr at the time of this writing, however. Kataib Hezbollah could still attempt to coerce the Iraqi government to abandon its demand that it withdraws from Jurf al Sakhr.
3. Saudi Arabia is conducting strategic interdiction efforts and airstrikes on Houthi energy infrastructure in order to render the Houthi movement unable or unwilling to continue its attacks on Saudi Arabia and ground offensives in Yemen, respectively. These efforts will likely fail to achieve Saudi objectives given that Yemeni government-aligned ground forces are incapable of halting Houthi advances, however.

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Toplines

Iran will likely attempt to run the US naval blockade in the coming days in an attempt to break the blockade. Iran's deteriorating economic situation is increasingly dire, which is forcing Iranian officials to reckon with the necessity of breaking the US blockade.[1] Tehran municipality-affiliated outlet Hamshahri claimed on November 20 that Iran has staged 14 tankers at Kharg Island to attempt to run the blockade.[2] Attempting to run the blockade would expose Iran to significant risk that ranges from the destruction of a tanker fleet at minimum to possibly resuming a larger-scale conflict with the United States, or both. Iran's willingness to accept these risks demonstrates the degree to which the regime views the current economic situation as both dire and unsustainable. This view and the degree of risk acceptance suggests that maintaining the blockade is putting the regime in an increasingly untenable situation, at least from the regime's perspective. The US blockade has prevented Iran from moving substantial amounts of crude oil from the Persian Gulf to global markets.[3] Iran is experiencing worsening inflation, rising living costs, and continued depreciation of its currency as a result of its inability to move substantial amounts of crude.[4] The United States has taken several recent steps to further restrict any Iranian attempts to move oil out of the country. The Joint Maritime Information Center announced on November 18 that the blockade will now include vessels that have received cargo via a ship-to-ship transfer from a vessel carrying cargo loaded at an Iranian port or coastline.[5]

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Running the blockade will force the United States to either stop the blockade runners by force or let them pass, which renders the blockade ineffective and therefore invalid. The Iranian regime's optimal scenario would be that the United States allows the blockade runners to pass to avoid a resumption of conflict, given that doing so would collapse the blockade's effectiveness (in addition to its validity). Iran could believe that the United States will be unwilling to allow blockade running (and its consequences). Iran would then respond by attacking infrastructure in the Gulf. Islamic Revolutionary Guards Corps (IRGC)-affiliated Fars News Agency argued on November 18 that Iran should publicly dispatch a tanker convoy and retaliate against regional energy and technology infrastructure if US forces enforce the blockade and interdict the convoy.[6] This would increase the military and political costs necessary to maintain the blockade, even if it did not end the blockade.

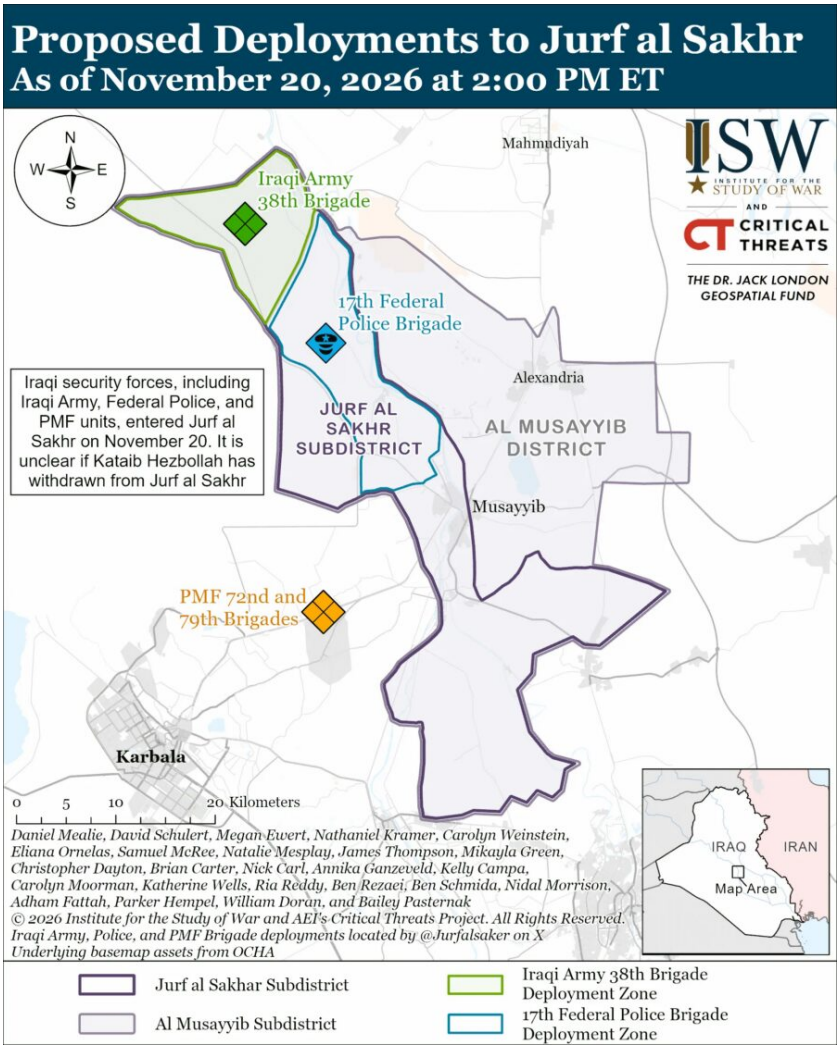
Iran may calculate that the Gulf states would pressure the United States to end the war prematurely if the fighting resumed. This would create diplomatic challenges for the United States as it seeks to sustain the support of its allies for a renewed strike campaign that would almost certainly result in Iran targeting critical Gulf infrastructure. Iran could calculate that further Iranian attacks or the threat of such attacks would cause the Gulf states to pressure the United States to end the war. Iran could also calculate that the threat will compel Gulf states to pressure the United States to allow Iranian tankers to pass. Iranian attempts to run the blockade, therefore, impose a series of dilemmas on the United States by either collapsing the blockade or returning to a war that imposes undesirable political costs on the United States by straining its relationships with Gulf allies. **ISW-CTP makes no assessment about whether this Iranian theory of the case would be successful or unsuccessful.**

Islamic Revolutionary Guards Corps (IRGC) Quds Force Commander Brigadier General Esmail Ghaani likely pressured Kataib Hezbollah Secretary General Abu Hussein al Hamidawi to agree to allow Iraqi federal government forces to enter some areas of Jurf al Sakhr, Babil Province. Iraqi security forces, including Federal Police, Popular Mobilization Forces (PMF), and Iraqi

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Army units, entered Jurf al Sakhr on November 20, according to Iraqi and Western media as well as footage from the area.[7] Kataib Hezbollah has controlled Jurf al Sakhr since 2014 and has denied the Iraqi federal government access to the area for over a decade.[8] The Iraqi government previously demanded that Kataib Hezbollah withdraw from Jurf al Sakhr by November 20 after a government-led investigation found further evidence to corroborate claims of Kataib Hezbollah's involvement in oil smuggling in Jurf al Sakhr.[9] Kataib Hezbollah has generated millions of dollars in illicit revenue from oil smuggling in the Jurf al Sakhr area since 2021, according to the leaked Iraqi Interior Ministry report.[10]

Iraqi security forces' entry into Jurf al Sakhr despite Hamidawi's previous public opposition to allowing any Iraqi government presence in Jurf al Sakhr suggests that Ghaani likely pressured Hamidawi into an agreement.[11] Iraqi forces notably entered Jurf al Sakhr after Ghaani met with Hamidawi on November 19. Ghaani wields significant influence over Iranian-backed Iraqi militias and has previously successfully pressured Iranian-backed Iraqi militias to take actions against their wishes.[12] ISW-CTP previously assessed that Ghaani could condition the resumption of material and financial support to Kataib Hezbollah on Hamidawi agreeing to a deal with the Iraqi government regarding Jurf al Sakhr.[13] It is unclear what incentives Ghaani may have used to pressure Hamidawi into accepting the agreement.



It is unclear whether Kataib Hezbollah has withdrawn its forces from any areas of Jurf al Sakhr at the time of this writing, however. An Iraqi government source told Qatari-owned media on November 20 that the militia will "gradually" withdraw to areas within Anbar and Muthanna provinces.[14] Security and military sources also claimed to Saudi-owned media on November 20 that three Kataib Hezbollah brigades have left Jurf al Sakhr.[15] ISW-CTP cannot verify the reported

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withdrawals at the time of this writing. A political source told Saudi-owned media on November 20 that a limited Kataib Hezbollah force remains in ”locations of importance” to the militia.[16] Iraqi media footage separately showed Kataib Hezbollah members standing near and meeting with Iraqi officers on November 20 following the deadline for the militia to withdraw.[17] The remaining Kataib Hezbollah presence in Jurf al Sakhr could indicate that the deal that Ghaani brokered between the militia and Baghdad is intentionally designed to prevent the Iraqi federal government from fully exerting control over Jurf al Sakhr.

Kataib Hezbollah could still attempt to coerce the Iraqi government to abandon its demand that it withdraws from Jurf al Sakhr. A Kataib Hezbollah spokesperson rejected on November 19 that the militia would withdraw from Jurf al Sakhr.[18] Hamidawi stated on November 19 that it would settle its issues with the Iraqi government via “private channels,” which suggests that the militia will attempt to coerce the Iraqi government to abandon its demand for the militia to withdraw from Jurf al Sakhr.[19] Iranian-backed Iraqi militias have historically used force, and the threat of force, to compel the Iraqi government to meet militia demands.[20] Militia units that have reportedly departed from the area could also attempt to return, thereby undermining the agreement.

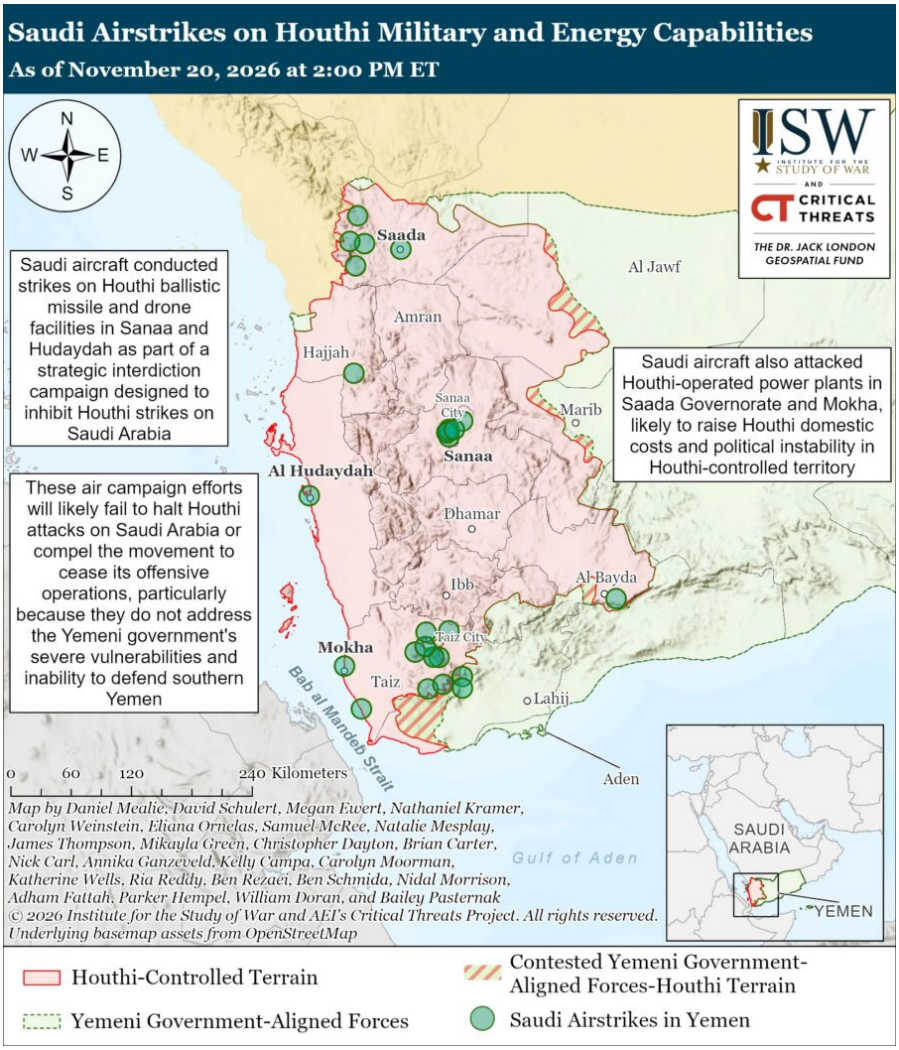
Ghaani likely pressured Hamidawi into accepting a limited Iraqi federal deployment into Jurf al Sakhr to avoid an armed conflict between Kataib Hezbollah and the Iraqi federal government and preserve the militia. An armed conflict would almost certainly further divide the Shia Coordination Framework, a loose coalition of Iraqi Shia parties, given that the framework was already divided over Prime Minister Ali al Zaydi’s earlier threats to force Kataib Hezbollah to withdraw from Jurf al Sakhr.[21] The Iranian regime has historically pressured the framework to remain unified in order to ensure that the framework retains control of the Iraqi government.[22] Ghaani may also calculate that an armed confrontation between Kataib Hezbollah and the Iraqi government in Jurf al Sakhr could weaken the militia or damage its image as a fighting force if the Iraqi government is able to inflict serious damage on the militia.

Saudi Arabia is conducting strategic interdiction efforts and airstrikes on Houthi energy infrastructure in order to render the Houthi movement unable or unwilling to continue its attacks on Saudi Arabia and ground offensives in Yemen, respectively. The Saudi Joint Forces Command announced on November 20 that Saudi forces conducted numerous airstrikes targeting Houthi ballistic missile and drone components and facilities in major Houthi-controlled Yemeni cities, including Hudaydah and Sanaa.[23] These strikes appear to constitute a strategic interdiction operation that is likely designed to prevent the Houthis from attacking Saudi Arabia by threatening critical nodes in the Houthis’ weapons supply chain, including the movement’s smuggling hub at Hudaydah and its military command and stockpiles in Sanaa.[24] Saudi Arabia seeks to relieve the significant political and economic pressure that the Houthi strike campaign is imposing on the kingdom by degrading the Houthis’ ability to conduct attacks on Saudi oil facilities, civilian airports, and other critical infrastructure.[25]

Saudi aircraft also likely struck energy infrastructure in Houthi-controlled parts of Yemen on November 20 in order to raise the Houthis’ domestic costs and generate political instability in Houthi-controlled territory. Houthi media and a DC-based Yemen analyst reported on November 20 that Saudi aircraft struck Houthi-controlled power stations in Qahza, Saada Governorate, and in Mokha near the Bab al Mandeb Strait.[26] Saudi Arabia may intend to exacerbate dire economic conditions in Houthi-controlled territory in order to destabilize Houthi control over most of Yemen and compel the group to abandon its offensive campaigns.[27] The Houthis initially resumed their war with Saudi Arabia in July 2026 to extract mostly economic concessions that would alleviate these dire, largely self-imposed economic conditions, for instance.[28] Saudi Arabia previously struck Houthi oil storage facilities in Yemen on October 13, likely

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to impose a similar effect.[29] Saudi Arabia had not made any concerted effort until now to continue those patterns of strikes on Houthi energy infrastructure.



These efforts will likely fail to achieve Saudi objectives given that Yemeni government-aligned ground forces are incapable of halting Houthi advances, however. The Saudi air campaign most crucially fails to compensate for Yemeni government-aligned ground forces' incapacity to effectively defend territory against Houthi advances, which is the most salient factor in the Houthis' current success.[30] The Houthis have captured vast swaths of territory in Lahij Governorate in recent days, despite clear Yemeni government defensive advantages in some instances and are threatening to besiege and capture the Yemeni government's temporary capital at Aden in the near term.[31] Houthi forces' recent attempted advances northeast of Aden in Abyan Governorate add to this near-term threat to the Yemeni government's survival by opening a new front for overstretched government-aligned forces to defend (see below in "Arabian Peninsula" section).[32] Air power, even if well-coordinated with local ground forces for close air support (CAS), cannot take the place of a ground force that must competently hold terrain. The urgency of the Houthis' near-term threat to Aden similarly denies Saudi Arabia a longer timeframe that would likely be necessary to meaningfully degrade Houthi capabilities and break Houthi will through air operations.

Saudi strategic interdiction efforts are therefore unlikely to succeed in compelling the Houthis to abandon their offensive campaigns because the Houthis likely believe that they are relatively close to defeating Saudi Arabia and the Yemeni government.[33] Similar patterns of Saudi airstrikes in recent months have failed to break the Houthis' will to continue attacking Saudi Arabia, as the group has steadily expanded

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the scope and scale of its strike campaign on Saudi infrastructure.[34] Houthi military spokesperson Yahya Sarea most recently announced on November 20 that the Houthis attacked a major power plant in al Shuqaiq, Jizan Governorate, and the port of Jizan in response to Saudi airstrikes on Houthi-controlled power plants and the port of Hudaydah.[35]

US and Partner Military Operations

See topline section.

Iranian Strike Campaign

Assessed Iranian War Aims:

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

See topline section.

US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

See topline section.

Arabian Peninsula

The Houthi movement and Yemeni government-aligned forces have deployed additional reinforcements to Abyan Governorate on November 20 after the Houthis initiated a new offensive in the area in recent days. UK-based, Qatari-owned media reported on November 20 that Yemeni government-aligned Homeland Shield Forces and Southern Giants Brigades units deployed

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reinforcements near Thara, Lawdar District, Abyan Governorate, and other areas in Abyan and Shabwa governorates on November 20.[36] Thara is located along the al Bayda-Aden ground line of communication (GLOC). The Support and Reinforcement Brigades, another Yemeni-government aligned faction, similarly deployed forces to Lawdar District, on November 19, according to southern Yemeni media.[37] Saudi aircraft also reportedly continued to strike Houthi staging areas in neighboring Mukayras District, al Bayda Governorate, on November 20.[38] Saudi aircraft previously attacked Houthi forces in Mukayras District on November 19 that likely supported the Houthi advance in the area.[39]

Houthi forces attempting to advance into Abyan Governorate via Thara will likely face geographic challenges as the topography between Houthi-controlled territory in Mukayras District and Thara canalizes Houthis forces along a small and exposed mountain road that descends to lower terrain in Lawdar District. Houthi advances down the Thara road would likely render Houthi forces, particularly vehicles, vulnerable to Saudi airstrikes. Houthi advances along this road also pose a threat to government forces in that the high ground provides Houthi forces with a direct fire advantage over Yemeni government-aligned forces attempting to counter the Houthi advances, however.

Houthi advances along the al Bayda-Aden GLOC may also represent a Houthi effort to open another front from which the movement could threaten Aden City from the east. Current Houthi positions on the al Bayda-Aden GLOC are over 160 kilometers from Aden City, but the Houthis may be attempting to fix government aligned forces and prevent these forces from redeploying to support other Yemeni government-aligned forces currently defending Aden City, the de facto Yemeni capital.[40] The Houthi effort may also seek to draw Yemeni government-aligned forces away from the fronts in southwestern Yemen, particularly fronts along the routes to Aden City.[41] The Southern Giants Brigades, Homeland Shield Forces, and Support and Reinforcement Brigades are the primary Yemeni government-aligned factions currently fighting against Houthi advances west of Aden City.[42]

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Iran Update, November 21, 2026

William Doran, Ria Reddy, Carolyn Moorman, Kelly Campa

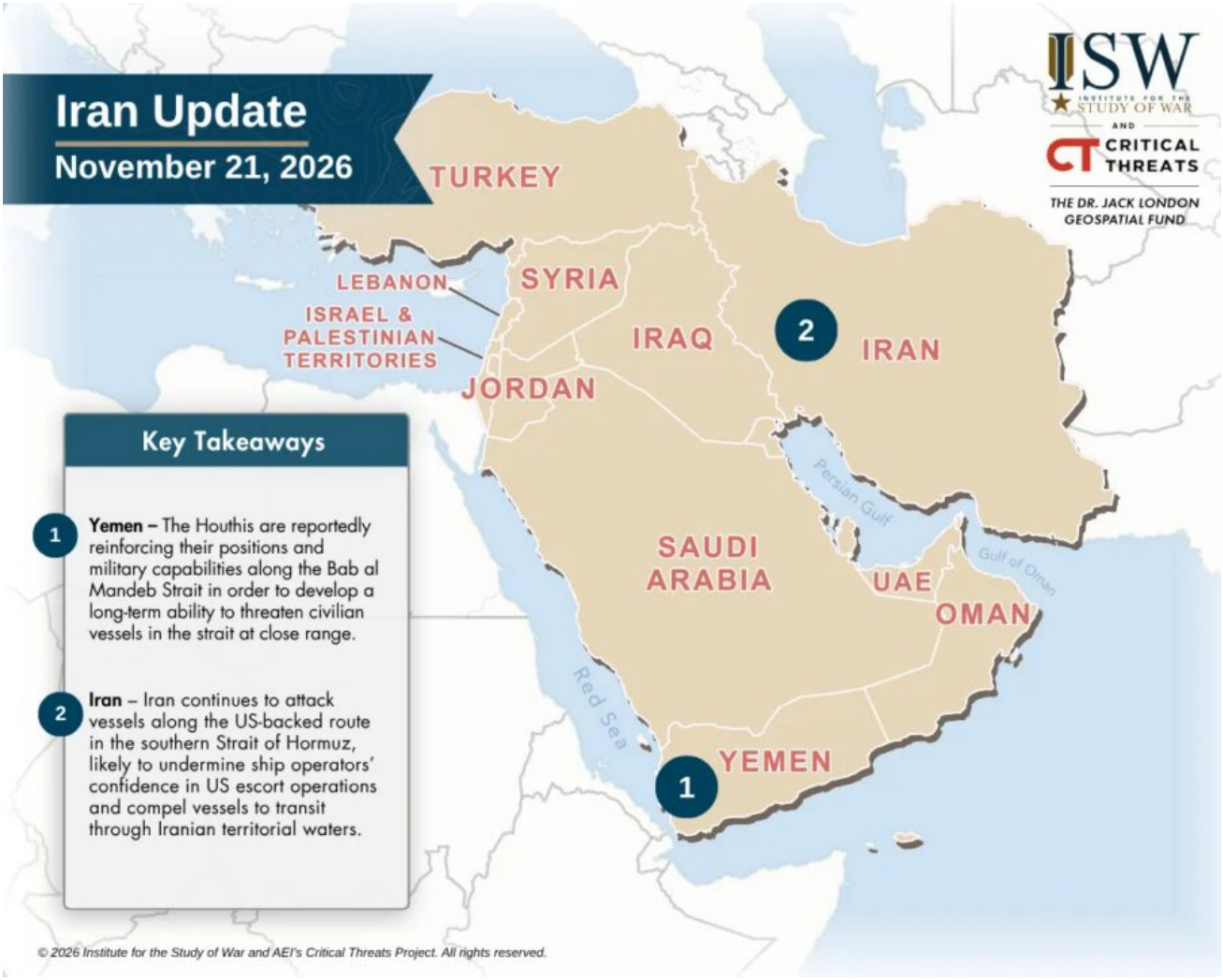
Analyst Notes: Data Cutoff: 2:00 PM ET

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 are reportedly reinforcing their positions and military capabilities along the Bab al Mandeb Strait in order to develop a long-term ability to threaten civilian vessels in the strait at close range. Unspecified military and local sources told UK-based, Qatari-owned media on November 21 that the Houthis are constructing a network of fortifications, including tunnels and berms, along the Bab al Mandeb at the southern edge of the Red Sea coastal plain.
2. Iran continues to attack vessels along the US-backed route in the southern Strait of Hormuz, likely to undermine ship operators' confidence in US escort operations and compel vessels to transit through Iranian territorial waters. United Kingdom Maritime Trade Operations (UKMTO) reported two projectile attacks against tankers in and near the Strait of Hormuz, including one strike that hit an engine room 17 nautical miles east of Khasab, Oman, and another that hit a vessel's stern 11 nautical miles north of Khasab.

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Toplines

The Houthis are reportedly reinforcing their positions and military capabilities along the Bab al Mandeb Strait in order to develop a long-term ability to threaten civilian vessels in the strait at close range. Unspecified military and local sources told UK-based, Qatari-owned media on November 21 that the Houthis are constructing a network of fortifications, including tunnels and berms, along the Bab al Mandeb at the southern edge of the Red Sea coastal plain.[1] The sources claimed that these fortifications, particularly the tunnels, are designed to conceal and protect Houthi armored vehicles, military equipment, and weapons crews deployed to the area from Saudi airstrikes.[2] The sources added that the Houthis have begun to deploy radar systems to areas along the Bab al Mandeb in order to detect vessels transiting the strait and that recent Houthi construction work atop Jabal Kahbub could indicate plans to install missile and drone launchers overlooking the strait.[3] International media previously reported on September 19 that Iranian Islamic Revolutionary Guards Corps (IRGC) operatives visited Houthi positions along the Bab al Mandeb to survey potential radar positions.[4]

ISW-CTP has assessed since September 2026 that consolidated Houthi control over terrain along the Bab al Mandeb would permit the movement to use a broader range of strike platforms to threaten shipping in the strait.[5] The withdrawal of Yemeni government-aligned forces from all positions within 65 kilometers of the Bab al Mandeb in recent days has insulated terrain and logistical lines on the coastal plain from potential ground or artillery attacks and enabled the Houthis to secure the area.[6] The Houthis are now likely exploiting this favorable operational environment to establish a fortified base for close-range strikes

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on vessels in the strait, if these reports are accurate. Radar arrays positioned along the Bab al Mandeb would likely enable the Houthis to track nearby vessels with greater accuracy and use short-range weapons, including artillery, to target them.[7] Recent Houthi promises to ensure safe passage for non-Saudi civilian vessels are in fact declarations of illegal authority over international shipping, and the Houthi movement is setting long-term conditions to control international maritime traffic with violent force.[8]

US and Partner Military Operations

Nothing significant to report.

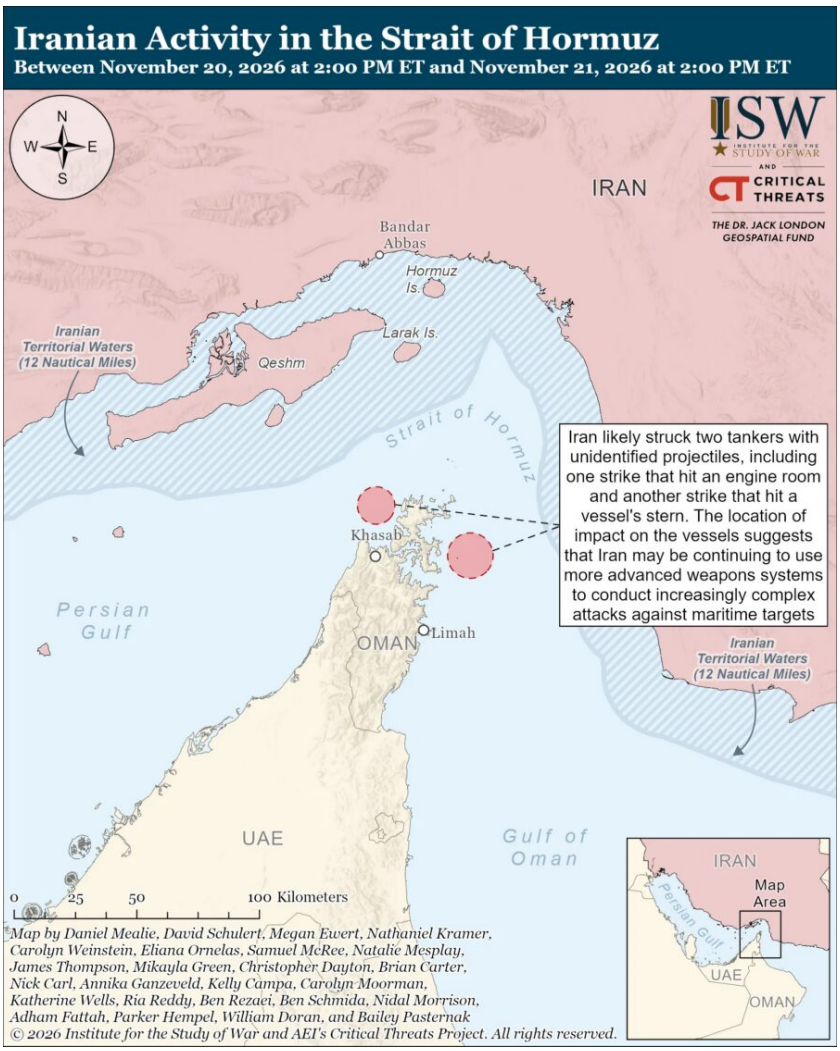
Iranian Strike Campaign

Assessed Iranian War Aims:

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

Iran continues to attack vessels along the US-backed route in the southern Strait of Hormuz, likely to undermine ship operators' confidence in US escort operations and compel vessels to transit through Iranian territorial waters. United Kingdom Maritime Trade Operations (UKMTO) reported two projectile attacks against tankers in and near the Strait of Hormuz, including one strike that hit an engine room 17 nautical miles east of Khasab, Oman, and another that hit a vessel's stern 11 nautical miles north of Khasab.[9] Iran may have struck the Marshall Islands-flagged, Saudi-owned LUJAIN in the attack 17 nautical miles east of Khasab.[10] The strike on the engine room is consistent with a recent increase in Iranian attacks on vessels' engine rooms. ISW-CTP previously assessed that Iran may be using drones or cruise missiles equipped with infrared terminal guidance systems rather than ballistic missiles to conduct these attacks because strikes against engine rooms almost certainly require projectiles that can approach a vessel along a horizontal flight path.[11] The strike on the vessel's stern could also indicate the use of a drone or cruise missile because the stern sits close to the engine room and, therefore, its positioning may similarly require a projectile to use a horizontal flight path, depending on where the projectile landed on the stern. Iran may have intended to hit the engine room but struck the stern instead or, alternatively, deliberately targeted the stern to disable the vessel's propulsion or steering systems. Both attacks nonetheless suggest that Iran may be continuing to employ more advanced weapons systems to conduct precise attacks against maritime targets.[12]

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US-Iran Negotiations

Nothing significant to report.

Iranian Domestic Affairs

Nothing significant to report.

Lebanon

Nothing significant to report.

Iraq

Nothing significant to report.

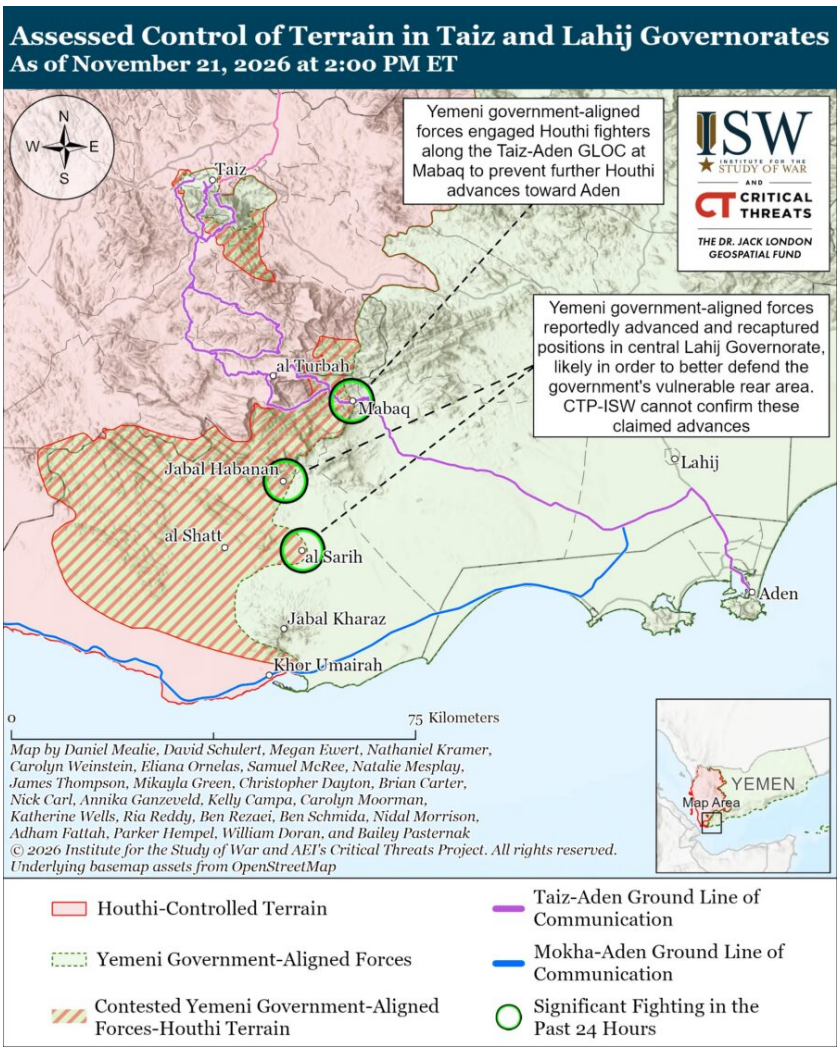
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Arabian Peninsula

Yemeni government-aligned forces are reportedly engaging Houthi fighters in northern and central Lahij Governorate in order to prevent Houthi advances toward Aden and infiltrations of the government's exposed rear area. UK-based, Saudi-owned media reported on November 21 that Yemeni government-aligned forces engaged Houthi fighters in the vicinity of Mabaq, along the Taiz-Aden ground line of communication (GLOC) in Maqatirah District, northern Lahij Governorate.[13] An independent Yemeni journalist separately reported on November 21 that Yemeni government-aligned forces assaulted and recaptured several Houthi-held positions near Am Sarih, north of the Jabal Kharaz mountain in central Lahij Governorate.[14] The journalist also claimed that Yemeni government-aligned forces recaptured Jabal Habanan, which is a low mountain about 15 kilometers north of Am Sarih, and advanced into the nearby village of al Hanjarah.[15] ISW-CTP cannot verify any claims of Yemeni government advances in Lahij Governorate at the time of this writing, however.

The Yemeni government may be attempting to recapture Jabal Habanan and terrain surrounding Am Sarih in order to establish defensible positions and fire control over surrounding wadis and low valleys. Yemeni government-aligned forces could then use their control of those areas to attempt to slow or inhibit Houthi advances. Yemeni government-aligned forces have repeatedly demonstrated poor coordination and an inability to mount effective defenses in Lahij Governorate, however.[16] Yemeni government-aligned forces also face a high risk of overextension in Lahij Governorate from several Houthi offensive efforts.[17] Recent Houthi deployments and engagements indicate that the movement seeks to overwhelm government-aligned forces with simultaneous engagements along several GLOCs extending toward Aden.[18]

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The Houthi movement likely targeted Saudi critical infrastructure on November 20 as part of its ongoing campaign to compel Saudi Arabia to end military operations in Yemen and accept Houthi economic demands. Saudi air defenses intercepted a Houthi drone over southern Saudi Arabia and three ballistic missiles over Riyadh on November 20.[19] Saudi air defenses intercepted another Houthi drone over Riyadh on November 21.[20] The Houthi movement has regularly attacked various Saudi critical infrastructure targets in Riyadh and throughout the country during the current conflict.[21] The Houthis seek to impose economic and political costs on Saudi Arabia to compel the kingdom to submit to Houthi demands, which include ending Saudi support for Yemen's legitimate government, lifting Saudi controls on Houthi-controlled ports and airports, and granting the Houthis control over Yemen's oil and gas resources.[22]

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