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U.S. Military Strikes on Iran – SITREP #3: March 2, 2026

F-2026-03-02a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics

March 2, 2026

Scope Note

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| Key Findings

- Following the death of Supreme Leader Ayatollah Khamenei, Iran expanded its attacks in Saudi Arabia, Kuwait, Bahrain, the United Arab Emirates (UAE), and Qatar while Iran-aligned proxy groups in Iraq and Lebanon attacked U.S. and Israeli positions.
- If the Iranian government perceives it is in an existential battle, it will likely revert to asymmetric targeting designed to ensure the survival of the government. This is almost certain to result in Iran increasing its targeting of shipping and energy infrastructure while proxy groups organize attacks against U.S. bases and Red Sea shipping, alongside organizing demonstrations or asymmetric attacks against U.S. diplomatic missions.
- The death of Ayatollah Khamenei increases uncertainty surrounding Iran's next steps. There is a roughly even chance the changes in leadership will either provide an opening to negotiate the end of the conflict or solidify Iran's opposition to concessions. This could include amending Iran's long-standing positions on the nuclear program and its support for regional proxies, but Khamenei's successor is unlikely to countenance concessions that imperil the government. Any concessions risk being upended by Khamenei's eventual long-term successor.

Combat Details

In comments to several outlets, U.S. President Donald Trump stated that he expects U.S. military strikes to last four to five weeks.¹²³ In the last 24 hours, Iran's missiles and drones struck or were intercepted over Israel, Saudi Arabia, Kuwait, Bahrain, the UAE, and Qatar. A Dubai container port came also under attack, while a major Saudi oil refinery paused operations after being hit; Kuwaiti air defenses also mistakenly shot down three U.S. F-15 fighter jets.⁴

Israeli health officials indicated that no casualties resulted from Iran's latest missile and drone salvo that occurred during morning hours local time on March 2, 2026, leaving the death toll in Israel standing at 11, with more than 140 injured.⁵⁶⁷

- Unlike the Twelve-Day War in June 2025, Iran appears to be firing much smaller batches of drones and rockets at Israel, raising the chances of successful missile interception.⁸ Iran has likely adopted this tactic because its targeting has expanded from only Israel to include targets across the Middle East.

British officials announced that, during afternoon hours local time on March 2, 2026, British fighter jets intercepted two Iranian drones headed for the UK's Royal Air Force base in Akrotiri, Cyprus. This came a day after an Iranian drone struck the military facility at

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[hXXps://www.economist\[.\]com/middle-east-and-africa/2026/03/01/war-succession-and-the-perilous-test-of-two-myths-about-iran](https://www.economist.com/middle-east-and-africa/2026/03/01/war-succession-and-the-perilous-test-of-two-myths-about-iran)

² [hXXps://www.nytimes\[.\]com/2026/03/01/us/politics/trump-iran-war-interview.html](https://www.nytimes.com/2026/03/01/us/politics/trump-iran-war-interview.html)

³ [hXXps://www.dailymail\[.\]co\[.\]uk/news/article-15604385/donald-trump-daily-mail-interview-iran.html](https://www.dailymail.co.uk/news/article-15604385/donald-trump-daily-mail-interview-iran.html)

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[hXXps://www.reuters\[.\]com/world/middle-east/kuwait-intercepts-hostile-drones-third-day-iran-retaliatory-strikes-2026-03-02/](https://www.reuters.com/world/middle-east/kuwait-intercepts-hostile-drones-third-day-iran-retaliatory-strikes-2026-03-02/)

⁵ [hXXps://www.timesofisrael\[.\]com/liveblog_entry/no-injuries-reported-in-latest-iranian-missile-salvo-3/](https://www.timesofisrael.com/liveblog_entry/no-injuries-reported-in-latest-iranian-missile-salvo-3/)

⁶ [hXXps://www.aljazeera\[.\]com/news/2026/3/1/us-israel-attacks-on-iran-death-toll-and-injuries-live-tracker](https://www.aljazeera.com/news/2026/3/1/us-israel-attacks-on-iran-death-toll-and-injuries-live-tracker)

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[hXXps://www.timesofisrael\[.\]com/liveblog_entry/injured-toll-in-beersheba-strike-rises-to-19-most-are-lightly-hurt/](https://www.timesofisrael.com/liveblog_entry/injured-toll-in-beersheba-strike-rises-to-19-most-are-lightly-hurt/)

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[hXXps://www.economist\[.\]com/middle-east-and-africa/2026/03/01/ali-khamenei-may-be-dead-but-donald-trump-has-unfinished-business](https://www.economist.com/middle-east-and-africa/2026/03/01/ali-khamenei-may-be-dead-but-donald-trump-has-unfinished-business)

approximately 12:00 AM on March 1, 2026, causing "minimal damage."⁹ These incidents represent the first time Iran has ever kinetically targeted a European country.

Proxies Join

Overnight on March 1-2, 2026, Hezbollah launched a number of rockets and drones into Israel for the first time since the ceasefire between Israel and the militant organization went into effect in November 2024.

- According to the group, the attack targeted a military base outside of Haifa and was in retaliation for the killing of Iran's Supreme Leader Ali Khamenei on February 28, 2026, as well as a "response to the repeated Israeli aggressions" against Lebanon.¹¹
- Following this attack, Israel launched a series of strikes across Lebanon during the early morning hours of March 2, 2026.¹²

Hezbollah remains significantly weakened from its war with Israel and is unlikely to seek to further escalate the conflict. However, Hezbollah also attempted to avoid a ground war with Israel in 2024 but was unable to do so. There is a roughly even chance the Israeli government and military is preparing a second invasion into Lebanon.

Impact on the Energy Sector

Energy oil prices spiked significantly in response to the conflict; however, concerns over Iran fully closing the Strait of Hormuz and extensively targeting energy infrastructure have yet to materialize.

- The Ras Tanura oil refinery near Dammam in Saudi Arabia was temporarily shut down after being struck by Iranian drones during afternoon hours local time on March 2, 2026.¹³

⁹ [hXXps://www.bbc\[.\]com/news/articles/cm2r0q310e3o](https://www.bbc.com/news/articles/cm2r0q310e3o)

¹⁰ [hXXps://www.theguardian\[.\]com/world/2026/mar/02/uk-airbase-raf-akrotiri-cyprus-suspected-drone-strike](https://www.theguardian.com/world/2026/mar/02/uk-airbase-raf-akrotiri-cyprus-suspected-drone-strike)

¹¹ [hXXps://www.aljazeera\[.\]com/news/2026/3/2/israel-bombs-beirut-after-hezbollah-launches-rocket-attack](https://www.aljazeera.com/news/2026/3/2/israel-bombs-beirut-after-hezbollah-launches-rocket-attack)

¹² [hXXps://www.theguardian\[.\]com/world/2026/mar/02/israel-idf-strikes-hezbollah-beirut-lebanon-iran-war](https://www.theguardian.com/world/2026/mar/02/israel-idf-strikes-hezbollah-beirut-lebanon-iran-war)

¹³

[hXXps://www.cbsnews\[.\]com/live-updates/us-iran-war-israel-supreme-leader-khamenei-funeral-day-2/#post-update-02fddbc0](https://www.cbsnews.com/live-updates/us-iran-war-israel-supreme-leader-khamenei-funeral-day-2/#post-update-02fddbc0)

- QatarEnergy announced that it ceased liquefied natural gas (LNG) production after Iranian attacks on its facilities in Ras Laffan Industrial City and Mesaieed Industrial City.¹⁴
- Brent crude—the global benchmark for oil prices—jumped by more than 10 percent, briefly exceeding USD 82 a barrel on March 2, 2026, before falling slightly back to USD 79. Meanwhile U.S.-based West Texas Intermediate (WTI) has risen more than 8 percent to USD 72.60.¹⁵ After Russia’s war in Ukraine started in early 2022, oil prices increased to USD 139 a barrel.
- European LNG prices surged 28 percent.¹⁷

The latest energy price spike, while large, is unlikely to influence U.S. or Israeli decision-makers, as oil prices are only approaching the levels seen in early 2025.¹⁸ For now, the oil price increase is likely manageable for the global economy. However, the longer the conflict goes on and the more Gulf energy installations in particular are targeted, the bigger the risk of an energy crisis that impacts the global economy, with oil prices potentially rising to USD 125 a barrel. Commercial shipping in the region has largely paused—not because Iran has formally closed the Strait of Hormuz but due to self-imposed stoppages linked to increasing insurance costs.¹⁹ This scenario allows for alternative oil producers to increase output to offset some of the supply constraints from the war. Under such a scenario, energy prices will remain elevated above recent norms until a solution appears.

¹⁴

[hXXps://www.khaleejtimes.com/world/gulf/qatarenergy-stops-lng-production-after-attacks-on-ras-laffan-mesaieed-facilities](https://www.khaleejtimes.com/world/gulf/qatarenergy-stops-lng-production-after-attacks-on-ras-laffan-mesaieed-facilities)

¹⁵ [hXXps://www.nytimes.com/2026/03/01/business/energy-environment/iran-war-oil-prices.html](https://www.nytimes.com/2026/03/01/business/energy-environment/iran-war-oil-prices.html)

¹⁶ [hXXps://oilprice.com/oil-price-charts/](https://oilprice.com/oil-price-charts/)

¹⁷

[hXXps://www.bloomberg.com/news/articles/2026-03-02/european-gas-jumps-25-as-iranian-crisis-threatens-global-flows](https://www.bloomberg.com/news/articles/2026-03-02/european-gas-jumps-25-as-iranian-crisis-threatens-global-flows)

¹⁸ [hXXps://www.iea.org/reports/oil-market-report-january-2025](https://www.iea.org/reports/oil-market-report-january-2025)

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[hXXps://www.bloomberg.com/news/articles/2026-03-02/major-insurance-clubs-to-end-ship-war-risk-cover-in-persian-gulf](https://www.bloomberg.com/news/articles/2026-03-02/major-insurance-clubs-to-end-ship-war-risk-cover-in-persian-gulf)

| Forecast and Indicators

There is a roughly even chance that Iran will announce a new Supreme Leader by the end of this week. The Assembly of Experts (the 88-member body constitutionally mandated to select the next Supreme Leader) is likely convening and will almost certainly want to present a unified front by appointing a successor to Ali Khamenei as soon as possible.

There are unconfirmed reports that the head of Iran's seminaries, Ayatollah Alireza Arafī—who is reportedly serving in an interim leadership role—has also been killed in an airstrike. It is very likely that Israel will immediately seek to target any chosen successor.

- Israel almost certainly sees the current conflict as an opportunity to reset the regional security situation and will likely continue to target Supreme Leader successors as and when they are publicly announced.

The United States and Israel will likely continue their air campaign in Iran over the next 12 hours, with a likely strong focus on targeting Iran's ballistic missile launchers and drone production facilities in an effort to minimize attacks against Gulf states. Ground operations are very unlikely, because the United States lacks the number of troops in the region for a ground invasion of Iran. If the United States begins to deploy ground troops and equipment to the region, this would be an indication of an intention to escalate to ground operations.

Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

| Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%