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U.S. Military Strikes on Iran – SITREP #2 – March 1, 2026

F-2026-03-01a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics

March 1, 2026

Scope Note

*ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 10:00 AM (EST) on March 1, 2026**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.*

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| Key Findings

- Iranian state television has confirmed that Ayatollah Ali Khamenei, the Supreme Leader of Iran, was killed, while the U.S. Central Command disclosed that three U.S. service members have lost their lives in Operation Epic Fury. The Iranian government can likely withstand the loss of key leaders due to decentralized political decision-making and a long succession line.
- A complete overthrow of the government is unlikely from military airstrikes unless they are accompanied by domestic opposition. Therefore, the pace and breadth of military operations will likely be dictated by the opposition response, with likely pauses to allow for protests or government concessions.
- Iran is unlikely to offer concessions in the short term and will instead demonstrate that it can withstand U.S. and Israeli military force—which will very likely increase international pressure for a ceasefire.
- Iran's response will likely be dictated by the size of its military arsenal.
- Anti-American protests have been observed in countries with large Shiite populations, and there is a likely chance that they inspire further protests worldwide, especially near U.S./Israeli embassies and consulates.

Details

At 5:00 AM local time on March 1, 2026, Iranian state television confirmed that Ayatollah Ali Khamenei, the Supreme Leader of Iran, was killed.¹

- Iranian media reported that the daughter, son-in-law, and granddaughter of Khamenei had also been killed in strikes a day earlier.

The Iranian government can likely withstand the loss of key leaders, including Ayatollah Khamenei, due to decentralized political decision-making and a long succession line.

- Senior cleric Ayatollah Alireza Arafī is reportedly in a temporary leadership position. Arafī is joined by judiciary chief Gholam-Hossein Mohseni-Ejei and President Masoud Pezeshkian on the temporary three-person council tasked with selecting the new Supreme Leader.²

Over the coming days, U.S. and Israeli military operations will likely remain focused on military targets, such as ballistic-missile batteries and production facilities, command-and-control hubs, and political-leadership targets in Tehran.

- Israel claimed that by March 1, 2026, it had dismantled half of Iran's ballistic-missile capabilities.³

U.S. President Donald Trump said there are "some good candidates" to lead Iran,⁴ suggesting the U.S./Israeli military operation intends to dismantle and replace the existing Iranian political and military establishment. The likely aim would be to encourage a benign Iran that no longer threatens the region or has a nuclear weapons program.

- To this end, the kinetic operation would likely include solely targeting entities related to the Iranian Revolutionary Guards Corp (IRGC), which operates as an ideological parallel military loyal to the Supreme Leader.
- A simultaneous intent would be to elevate the role of the less ideological Artesh (Iranian military).

¹ [hXXps://www.axios\[.\]com/2026/02/28/iran-khamenei-killed-israel](https://www.axios.com/2026/02/28/iran-khamenei-killed-israel)

² [hXXps://www.reuters\[.\]com/business/media-telecom/alireza-arafi-appointed-irans-leadership-council-isna-reports-2026-03-01/](https://www.reuters.com/business/media-telecom/alireza-arafi-appointed-irans-leadership-council-isna-reports-2026-03-01/)

³ [hXXps://www.wsj\[.\]com/livecoverage/iran-strikes-2026/card/around-half-of-iran-s-ballistic-missile-launchers-destroyed-in-strikes-israel-says](https://www.wsj.com/livecoverage/iran-strikes-2026/card/around-half-of-iran-s-ballistic-missile-launchers-destroyed-in-strikes-israel-says)

⁴

[hXXps://www.cbsnews\[.\]com/news/trump-diplomatic-solution-in-iran-remains-possible-and-much-easier-now/](https://www.cbsnews.com/news/trump-diplomatic-solution-in-iran-remains-possible-and-much-easier-now/)

The pace and breadth of military operations will likely be partially dictated by Iran's response, with pauses possible to allow for concessions from the Iranian government or to determine the response from the domestic Iranian opposition.

- The military campaign will likely become more limited if no opposition emerges or extended if protests emerge.

The Iranian government has previously demonstrated that it can withstand widespread nationwide protests, the most recent one being the violent quashing of the January 2026 protests, which reportedly involved killing thousands of protesters. Amid challenging circumstances, the regime managed to maintain significant internal unity, reflected by the fact that government elements such as the IRGC, Basij militias, and the Artesh did not switch allegiance from the Ayatollah.

- Therefore, unless protests further paralyze the economy, divide the elite power structure, and erode the government's ability to suppress its opposition, the government will likely withstand the death of Ayatollah Khamenei and a solely airborne military operation.

Iran's Response

Following the death of Ayatollah Khamenei, Iran announced a new wave of missile and drone strikes on Israel, U.S. military sites, and Gulf and Arab allies in the region.⁵ Iran is unlikely to offer concessions in the short term and will instead demonstrate that it can withstand U.S. and Israeli military pressure while maintaining retaliatory-strike capabilities that increase international pressure for a ceasefire.

- U.S. Central Command announced that three U.S. service members have been killed and five injured so far in Operation Epic Fury.⁶
- U.S. Gulf allies will likely pressure the United States and Israel to end their campaign if they continue to be targeted by Iranian attacks. Following the death

⁵<https://www.theguardian.com/us-news/live/2026/mar/01/us-israel-war-on-iran-ayatollah-ali-khamenei-i-dead-latest-reports>

⁶ <https://x.com/CENTCOM/status/2028120499964805297?s=20>

of Ayatollah Khamenei, Iranian targeting has very likely been extended to targeting their energy infrastructure.⁷⁸

- There is a roughly even chance that the targeting of civilian areas in neighboring countries backfires on Iran, leading to countries like Saudi Arabia and the United Arab Emirates supporting or publicly backing the ongoing military operations on Iran.

However, Iran's ability to maintain credible offensive military operations is becoming more limited by the day, and its ability to withstand political pressure and avoid making concessions will very likely depend on the size of its military arsenal over the coming days.

Houthi rebels in Yemen have indicated that they will enter the conflict by targeting Israel, Gulf neighbors, and commercial ships in the Bab al-Mandeb strait, a vital energy corridor.⁹ Other Iranian proxies, like the remnants of Hezbollah in Lebanon and Shiite paramilitary networks in Iraq, have so far withheld from participating.

- There is a roughly even chance that the Hezbollah will join the conflict following confirmation of the death of Supreme Leader Ayatollah Khamenei.
- Israel is very likely preparing to send Israel Defense Forces (IDF) to the Lebanese border in preparation for an offensive operation against the Hezbollah.¹⁰

Impact on the Energy Sector

Starting on February 28, Iran warned merchant vessels against transiting the Strait of Hormuz (SoH), a vital shipping lane via which approximately 20 percent of the global energy exports pass. Following the death of Ayatollah Khamenei, Iran will likely attempt to formally close the SoH with mining operations and aggressive actions that threaten shipping vessels, including limited attacks against them.

- However, the ongoing airstrikes have likely limited Iran's naval capabilities to fully close the SoH.

⁷ [hXXps://x.com/i/status/2028114840770773418](https://x.com/i/status/2028114840770773418)

⁸ [hXXps://x.com/i/status/2028108442930471049](https://x.com/i/status/2028108442930471049)

⁹

[hXXps://www.timesofisrael.com/liveblog_entry/iranian-backed-houthis-say-theyll-resume-attacks-on-israel-and-on-shipping-routes/](https://www.timesofisrael.com/liveblog_entry/iranian-backed-houthis-say-theyll-resume-attacks-on-israel-and-on-shipping-routes/)

¹⁰ [hXXps://www.ynetnews.com/article/ngf0mz24z](https://www.ynetnews.com/article/ngf0mz24z)

- Over the short term, the SoH is likely impassable to commercial ships, which risk becoming collateral damage to attacks on U.S. military ships in the region.
 - Oman confirmed that one oil tanker has been struck in the SoH.¹¹
- Energy-producing nations led by OPEC+ announced a 200,000 barrel per day increase in oil production to help offset energy price increases.¹² However, this will likely prove insufficient without secure shipping lanes.

International Response

Protests against the U.S./Israeli military operations have begun, with the largest ones taking place near the U.S. embassies and consulates in Pakistan and Iraq, both of which have large Shiite populations. At least nine people were killed in protests near the U.S. consulate in Pakistan's largest city, Karachi. Further protests were reported at the U.S. embassy in Islamabad and the consulate in Peshawar.¹³ Protests have also taken place near the U.S. embassy in Baghdad, Iraq.¹⁴

At least eight countries in the region have declared their airspace closed, including Iran, Israel, Iraq, Jordan, Qatar, Bahrain, Kuwait, and the United Arab Emirates.¹⁵ Kuwait has also suspended its stock exchange¹⁶ and other leading Gulf stock exchanges are likely to do so, reflecting the wider economic damage from the war.

¹¹<https://www.wsj.com/livecoverage/iran-strikes-2026/card/oil-tanker-struck-in-strait-of-hormuz-in-first-shipping-attack-of-conflict-ZAmJgoEEoDr6rRnYx2Yr>

¹²<https://www.reuters.com/business/energy/opec-debates-oil-output-boost-us-war-iran-disrupts-shipments-2026-03-01/>

¹³ <https://www.dawn.com/news/1976965>

¹⁴<https://economictimes.indiatimes.com/news/international/world-news/iraqi-protesters-try-to-storm-baghdad-zone-housing-us-embassy/articleshow/128906452.cms>

¹⁵<https://www.aljazeera.com/news/2026/2/28/airspace-closed-airlines-halt-flights-as-us-israel-attack-iran-responds>

¹⁶<https://www.reuters.com/world/middle-east/muscat-stocks-tumble-as-strikes-iran-upend-regional-security-2026-03-01/>

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%