



| Brief |

Iran Protests Leading to Likely U.S. Response

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Scope Note

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Brief | Iran Protests Leading to Likely U.S. Response

Key Findings

- The Iranian government is under mounting pressure as nationwide protests, initially sparked by a failing economy, continue to rage across the country. The protests began on December 28 over the collapse of the Iranian rial and a new price structure for government-subsidized gasoline.
- Economic stress, loss of public trust in the government, and military defeats have likely combined to create the ideal conditions for the massive spread of this uprising. Despite the government's weakness, it very likely maintains the ability to put down the latest round of protests in the absence of external intervention. Even if this round of protests is suppressed and Iran returns to the status quo, it is highly likely the population will remain discontented, and a new round of protests will likely begin in 2026.
- U.S. involvement would likely change the calculus for outcomes in Iran. However, the U.S. Department of War is unlikely to conduct sophisticated military operations. The Trump administration is more likely to use diplomacy, increased global pressure, and low-level strikes to influence Iranian behavior.

Details

The Iranian government is under mounting pressure as nationwide protests, initially sparked by a failing economy, continue to rage across the country. The protests began on December 28, when merchants in the Grand Bazaar in the capital Tehran started protesting the collapse of the Iranian rial and a new price structure for government-subsidized gasoline.¹

- The collapse of the Iranian rial, which lost 16 percent of its value in December alone,² has led to soaring prices on essential food items and an annual inflation rate of 40 percent.³

Protests notably worsened around January 7, 2026, as protester grievances moved from economic to political and spread to more than 100 cities across all 31 provinces of Iran.

- According to reports from human rights activists on the ground in Iran, the collapse of the Iranian economy and deep lack of trust in government institutions have been cited as primary drivers for the protests.⁴

As the most recent protests have continued to grow, the Iranian government has reportedly used live ammunition and opened fire on protestors, with at least 2,403 deaths confirmed by human rights reporting; Iranian security officials affirm over 2,000 protesters have died.^{5,6}

- Determining an accurate number of deaths associated with the unrest is difficult because the Iranian government shut down the internet nationwide, which has led

¹ [hXXps://www.cnn\[.\]com/world/live-news/iran-protests-trump-01-14-26](https://www.cnn.com/world/live-news/iran-protests-trump-01-14-26)

² [hXXps://infohub\[.\]kz/tote/article/irans-protests-intensify-as-rial-collapses-inflation-hits-72-elite-rifts-widen.html](https://infohub[kz]/tote/article/irans-protests-intensify-as-rial-collapses-inflation-hits-72-elite-rifts-widen.html)

³ [hXXps://www.pbs\[.\]org/newshour/world/what-to-know-about-the-intensifying-protests-shaking-iran-and-putting-pressure-on-its-theocracy](https://www.pbs.org/newshour/world/what-to-know-about-the-intensifying-protests-shaking-iran-and-putting-pressure-on-its-theocracy)

⁴ [hXXps://www.en-hrana\[.\]org/a-report-on-the-twelfth-day-of-nationwide-protests-in-iran-widespread-strikes-internet-shutdown-and-surge-in-arrests/](https://www.en-hrana.org/a-report-on-the-twelfth-day-of-nationwide-protests-in-iran-widespread-strikes-internet-shutdown-and-surge-in-arrests/)

⁵ [hXXps://www.en-hrana\[.\]org/sixteenth-day-of-protests-families-of-victims-gather-at-behesht-zahra-cemetery-as-total-communications-blackout-continues/](https://www.en-hrana.org/sixteenth-day-of-protests-families-of-victims-gather-at-behesht-zahra-cemetery-as-total-communications-blackout-continues/)

⁶ [hXXps://www.reuters\[.\]com/world/china/iranian-mp-warns-greater-unrest-urging-government-address-grievances-2026-01-13/](https://www.reuters.com/world/china/iranian-mp-warns-greater-unrest-urging-government-address-grievances-2026-01-13/)

to disruptions in mobile internet access and has made it more difficult for on-the-ground reporting from Iran.⁷⁸

Cutting internet service across the country is almost certainly an effort to disrupt the organizing of further protests. It is also likely being used to prevent reporting on atrocities committed by the Iranian government, making it nearly impossible for human rights groups to confirm the level of government violence against its population.

- It is likely that limited internet connectivity is being provided by Starlink systems smuggled into Iran by non-governmental organizations (NGO) and human rights groups, though possession of these systems is likely risky and would almost certainly result in harsh punishment if discovered.
- Past uprisings have slowed following government actions to cut off internet access and preceded the use of live ammunition against protesters. As of January 14, protests are reportedly continuing, though the nationwide internet shutdown makes it difficult to determine their scale.⁹

State Weakness

Although there have been several other instances of nationwide protests in Iran since the founding of the Islamic Republic in 1979, the current situation appears to be moving along a much different trajectory. The protests that began in late December have likely already surpassed the protests that occurred in 2022 in terms of size and scale.

- Those 2022 protests—known as the Woman, Life, Freedom uprising—started in September of that year following the death of Mahsa Amini shortly after she was arrested by authorities for refusing to wear an Islamic headscarf. The protests continued for several months but had largely subsided by Spring 2023.¹⁰

The next barometer for protests is the 2009 Green Movement protests, which started over claims of rigged and undemocratic elections. At the time, the Green Movement protests were the largest episode of civil unrest in Iran since the 1979 Revolution.¹¹

⁷ [hXXps://www.en-hrana\[.\]org/day-fifteen-of-irans-nationwide-protests-sharp-rise-in-human-casualties/](https://www.en-hrana.org/day-fifteen-of-irans-nationwide-protests-sharp-rise-in-human-casualties/)

⁸ [hXXps://abcnews.go\[.\]com/US/irans-new-wave-protests-prompt-hospital-raids-internet/story?id=129020839](https://abcnews.go[.]com/US/irans-new-wave-protests-prompt-hospital-raids-internet/story?id=129020839)

⁹ [hXXps://understandingwar\[.\]org/research/middle-east/iran-update-january-13-2026/](https://understandingwar[.]org/research/middle-east/iran-update-january-13-2026/)

¹⁰ [hXXps://www.bbc\[.\]co\[.\]uk/news/world-middle-east-63430246](https://www.bbc[.]co[.]uk/news/world-middle-east-63430246)

¹¹ [hXXps://www.thenation\[.\]com/article/archive/protests-iran/](https://www.thenation[.]com/article/archive/protests-iran/)

- After a few weeks, government-backed Basij militias brutally suppressed protests across the country. Videos of one protester's death circulated around the world, building some level of international solidarity, but by early 2010 the protests came to an end.¹²

Compared to the 2009 and 2022 movements, the Iranian government is now likely in a much weaker position, both domestically and with respect to regional competitors. Economic stress, loss of public trust in the government, and perceived humiliation at the hands of Israel and the United States have likely combined to create the ideal conditions for the massive spread of this uprising. However, the unprecedented level of repression inherent in the government's response makes it likely this round of protests will wind down within the next two weeks in absence of external intervention by the United States or regional nations.

- Most notably, Iran lost a 12-day war with Israel in June 2025 that also saw U.S. airstrikes against Iranian nuclear sites. Israel's 12-day aerial campaign left Iran's vanguard military force, the Islamic Revolutionary Guard Corps (IRGC), decimated, with at least 30 top IRGC generals—likely an entire generation of leadership—killed by Israeli bombs. Additionally, the campaign destroyed the majority of Iran's air defenses and nuclear program and significantly damaged Iran's ballistic missile infrastructure. Conversely, Iran's missile barrages to counter the Israeli threat were largely ineffective.
- Iran's economic situation, which was already precarious, worsened in 2025. Since the June war, inflation has increased by 60 percent while the rial has lost 40 percent of its value,¹³ alongside high unemployment. In September, the United States reimposed economic sanctions against Iran for the alleged continuation of its nuclear program. This has been compounded by a water crisis and regular blackouts.

¹² *Ibid.*

¹³

[hXXps://www.bloomberg.com/news/articles/2026-01-14/iran-protests-how-inflation-and-a-currency-crash-fueled-unrest](https://www.bloomberg.com/news/articles/2026-01-14/iran-protests-how-inflation-and-a-currency-crash-fueled-unrest)

- Short of significant structural and political changes, Iran's economy is on a downward spiral that will almost certainly mean renewed social unrest in the medium term, even if this round of protests is suppressed. The rial lost 84 percent of its value in 2025, with food price inflation at 72 percent.¹⁴

It is highly likely the Iranian population will remain discontented, and a new round of protests will likely begin in 2026. It will almost certainly be difficult for the Islamic Republic to fully rebound from 40 percent annual inflation, military defeat, and food prices rising well beyond average incomes for Iranian citizens. These factors alone are a recipe for historical government collapse. In the case of Iran, the added element of economic sanctions and international ostracization makes a return to full strength nearly impossible.

| Looking Forward

Preserving the Status Quo

Currently, the most likely outcome of the protests is some return to the status quo—at least in the short term. Thus far the Iranian government has shown a level of internal unity consistent with past protest movements. The violent repression of protests and the killing of potentially thousands of protesters demonstrates the government's willingness and ability to put down the uprising.

Government elements such as the IRGC, Basij militias, and the Artesh do not appear at this time to have switched allegiance away from Supreme Leader Ayatollah Ali Khamenei. The brutal suppression of dissent this week demonstrates the security apparatus' unwillingness to side with protesters in a revolution to overthrow the Islamic Republic.

Unless there is significant intervention by either the United States or other nations in the Middle East—or defections from the government's own security apparatus—it is almost certain the Iranian government will regain control of the streets. However, U.S. military involvement would likely change the entire calculus of Iran's future.

¹⁴ [https://infohub\[.\]kz/tote/article/irans-protests-intensify-as-rial-collapses-inflation-hits-72-elite-rifts-widen.html](https://infohub[.]kz/tote/article/irans-protests-intensify-as-rial-collapses-inflation-hits-72-elite-rifts-widen.html)

Government Collapse

There is a very slight chance that the current government in Iran collapses as the result of a revolution stemming from the current protests. Following the protest escalation around January 7, 2025, the possibility that the Islamic Republic of Iran could be overthrown appeared more likely than at any point since 2009. However, the violent suppression of dissent and the killing of thousands of protesters make government collapse unlikely, barring outside intervention or significant government defections to the protesters' cause.

However, in the unlikely event protesters are successful in toppling the government, there would very likely be major implications for the wider Middle East and energy markets in particular. The resulting power vacuum would almost certainly be worse than in Venezuela, where remnants of the Venezuelan government of Nicolas Maduro have largely remained in place.

- Under a power vacuum scenario in Iran, the IRGC would likely attempt to consolidate power and establish a stable government. In order to do this, the IRGC would almost certainly work with hardline government clerics to reinforce the principles of the 1979 revolution and establish their own form of the Islamic Republic.
- It is possible that Supreme Leader Ali Khamenei will flee to Russia if the situation continues to escalate or if outside intervention renders his government powerless. If that happens, an internal struggle for power is almost certain.
- This would very likely lead to an even more internationally isolated Iran and politically oppressed population, paving the way for violence between competing groups and leading to refugee flows and likely violence between ethnic and religious groups.

In the currently unlikely event of government collapse, the IRGC will likely play the key role in determining who replaces Ali Khamenei as Supreme Leader or if a new constitution and form of government is adopted. In order for any uprising to overthrow the government entirely, the IRGC will have to be neutralized.

- Therefore, a more likely scenario is that Iran would maintain some semblance of the existing government, either via a reshuffle that largely preserves the system or a transition where the IRGC takes on a greater leadership role. This would likely coincide with the lifting of some social restrictions but even less ability for political dissent.

Major Foreign Involvement

U.S President Donald Trump has made the strongest statements of support for the Iranian protesters to date. On January 13, 2026, President Trump urged Iranians to keep fighting and to “take over institutions.” Further, he stated that “help is on the way” and that the United States would defend the uprising if the Iranian government follows through on threats to execute protesters.¹⁵

While unlikely, U.S. involvement could include precision military strikes to kill the Ayatollah and other key political and military leaders, especially among the IRGC. While this sort of military engagement would likely be the most meaningful in terms of breaking up the contemporary Iranian leadership, it would also likely have the most negative implications in terms of Iranian economic and military retaliation while also creating the highly damaging power vacuum scenario.

Iranian Retaliation

Despite its recent military losses, Iran reportedly maintains a large and sophisticated arsenal of ballistic missiles able to hit targets across the Middle East.¹⁶ For now, the government appears to still have the backing of the country’s myriad security forces, including the IRGC, making it likely these options will be utilized.

Western physical assets in the region would be at risk of terror attacks in this retaliation scenario, with embassies, military installations, international organizations, and Western

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[hXXps://www.reuters.com/world/china/iranian-mp-warns-greater-unrest-urging-government-address-grievances-2026-01-13/](https://www.reuters.com/world/china/iranian-mp-warns-greater-unrest-urging-government-address-grievances-2026-01-13/)

¹⁶

[hXXps://www.hudson.org/missile-defense/tehran-reloads-examining-current-future-threat-irans-missile-programs-can-kasapoglu](https://www.hudson.org/missile-defense/tehran-reloads-examining-current-future-threat-irans-missile-programs-can-kasapoglu)

companies in the region all being potential targets. In addition, the assets of oil companies, financial services, and telecommunications would be likely targets for cyberattacks.

- Iran-backed groups remain strong in Iraq, where many U.S. military assets are located. These groups did not follow through on threats to strike U.S. assets in Iraq during the 12-day war with Israel in June 2025 but may be more inclined to do so if the survival of Iran's government is at risk. Iranian allies such as the Yemeni Houthi Movement would likely also resume attacks on international shipping after pausing during the Israel-Hamas ceasefire.

The Middle Eastern oil industry is particularly vulnerable, as Iran has demonstrated an ability to impact the industry's operations; there is a roughly even chance Iran will block oil supply through the strategic Strait of Hormuz (SoH)—but only in a last-ditch, government survival scenario.¹⁷

- In such a scenario, Iran is likely to close the SoH with mines, small attack boats, and short-range missiles to warn off any oil tankers.

If Iran attempts to close the SoH in retaliation, the economic impact is expected to be huge; the SoH is a major transshipment point, with roughly 20 percent of the world's oil supply going through it on a daily basis. Shipping companies are likely to decide it is not worth passing near Iran in the Gulf of Oman if attacks are imminent.

If Iran closes the SoH, it is almost certain it would face a unified international response. Saudi Arabia, United Arab Emirates (UAE), the European Union, and other countries would very likely join the United States in forcing the reopening of the SoH. Additionally, Iranian allies in Russia and China would likely advise Iran against such an action, making this scenario unlikely (except in a government survival situation).

- If Iran closes the SoH, there would very likely be even more difficulty transporting oil by tanker ship in the Middle East, and its oil production would be further sanctioned, pushing prices up even further.¹⁸

¹⁷

[hXXps://www.drewry\[.\]co\[.\]uk/maritime-research-opinion-browser/maritime-research-opinions/potential-strait-of-hormuz-closure-threatens-21-of-global-ing-supply](https://www.drewry.co.uk/maritime-research-opinion-browser/maritime-research-opinions/potential-strait-of-hormuz-closure-threatens-21-of-global-ing-supply)

¹⁸ [hXXps://www.ft\[.\]com/content/b3faaef5-b68f-4a35-a54f-1305afda1483](https://www.ft.com/content/b3faaef5-b68f-4a35-a54f-1305afda1483)

- There is a roughly even chance Iran will target the oil facilities of other neighboring countries like Saudi Arabia and the UAE, which it has done in recent history.¹⁹

Most Likely U.S. Involvement

Following the initial successes of U.S. operations in Venezuela, there is a roughly even chance of targeted U.S. military operations in support of Iranian government sectors it can countenance, thus limiting the possibility of a destabilizing power vacuum. This would likely include solely targeting IRGC-related targets while elevating the role of the less ideological Artesh (Iranian military). The likely aim would be to encourage a benign Iran that abandons its nuclear weapons program, while giving the United States more exclusive access to the Iranian energy industry.

- In our Geopolitical Forecast 2026 report, ZeroFox stated that Iran's degraded military capabilities were a key factor behind the United States reducing its military commitments to the region.²⁰ In this context, the White House would very likely welcome an Iranian government that no longer threatens its neighbors or has a nuclear weapons program even if it maintains most of its existing infrastructure—thus avoiding a power vacuum that leads to instability and refugee flows across the region.

At the same time, there is a roughly even chance foreign pressure—particularly if it comes from Israel—will revive support for the Iranian government and blunt the protest movement. The Iranian population largely supported its government during the 12-day war in June, despite local grievances against the Iranian government. However, there are indications from reporting on the ground in Iran that at least some protesters welcome U.S. intervention on their behalf.²¹

- Resentment of Israeli bombings in June 2025, as well as alleged Israeli assassinations of Iranian officials over the years, would likely negate any benefit of Israeli action. For this reason, Israel will almost certainly stay out of any direct military involvement in Iran.

¹⁹ [hXXps://thesoufancenter\[.\]org/intelbrief-2024-october-14/](https://thesoufancenter.org/intelbrief-2024-october-14/)

²⁰ ZeroFox Assessment: Geopolitical Forecast 2026, December 18, 2025

²¹ [hXXps://www.abc\[.\]net\[.\]au/news/2026-01-15/from-inside-iran-protester-asks-donald-trump-to-help/106228502](https://www.abc.net.au/news/2026-01-15/from-inside-iran-protester-asks-donald-trump-to-help/106228502)

- The key factor in any foreign intervention is that the overthrow of the Islamic Republic must come from within. Even the most ardent supporters of the current uprising would almost certainly reject a new government brought about by a military-led regime change similar to the United States' Operation Absolute Resolve in Venezuela.

Conclusion

Economic stresses and perceived humiliation at the hands of Israel have likely combined to create the ideal conditions for the massive spread of this uprising in Iran. However, the unprecedented level of repression exhibited by the regime's response makes it likely this round of protests will wind down in the next two weeks, absent external intervention by the United States or regional nations or significant government defections to the protesters' cause.

There is a likely chance that the United States will get involved in the crisis in some way that likely falls short of the most sophisticated military attacks. The U.S. Department of War is more likely to use less robust military force—allowing the State Department to put diplomatic pressure on Iran while urging allied nations to increase sanctions—alongside the U.S. Navy interdicting Iran's shadow fleet of oil tankers to deny the Islamic Republic a key source of revenue.

Regardless of what happens with the current round of protests, the Iranian regime is at its weakest point since the 1979 Islamic Revolution. Discontent among the populace is unlikely to be abated by token gestures, and there is almost certainly very few options for Supreme Leader Ali Khamenei to maintain the status quo in the long term. Even if the current uprising fails, it is very likely that further Iranian protests and revolutionary movements will arise in 2026.

| 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%