

SSCI PREVIEW: KNOW WHO IS GOING TO SAY WHAT

SENATE SELECT COMMITTEE ON INTELLIGENCE — MARCH 18, 2026



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INTELLIGENCE ASSESSMENT

SSCI Preview:

Know Who Is Going To Say What

Classification:	Declassified – Analytic Purposes
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Topic:	Operation Epic Fury and Iran's Next Moves

EXECUTIVE SUMMARY

The Senate Select Committee on Intelligence convenes its annual Worldwide Threats hearing on Tuesday, March 18, 2026. This is not a routine oversight session.

Three intelligence principals will testify — Director of National Intelligence Tulsi Gabbard, CIA Director John Ratcliffe, and FBI Director Kash Patel — and each arrives under extraordinary circumstances that have no recent precedent.

The hearing takes place against a backdrop of active military conflict. Operation Epic Fury, the U.S. strikes against Iranian nuclear and military infrastructure, has reshaped the intelligence environment in ways that the Intelligence Community has not yet fully processed, let alone translated into reliable assessments. Iran has not responded with the mass-casualty attack that many analysts predicted. It has instead activated a layered, distributed pressure campaign — maritime, cyber, proxy, and potential homeland — that defies the binary deterrence logic of previous administrations.

The three witnesses represent a departure from the institutionalist culture that has historically insulated the DNI, CIA, and FBI from political friction during this hearing.

Gabbard brings a skepticism of intelligence community (IC) orthodoxy that has made career analysts uncomfortable. Ratcliffe inherits an agency still processing the operational consequences of Epic Fury. Patel runs a bureau whose domestic counterterrorism posture is under pressure from multiple simultaneous threat streams — four known domestic kinetic events in the preceding months, a confirmed 93% lone-actor probability assessment, and a persistent question about what CJNG's 35-plus city cells are actually positioned to do.

The SSCI has its own fault lines. The committee's Republican majority will push for more aggressive posture and lean into the vindication narrative of Epic Fury.

Democratic members will probe casualty figures — specifically the KC-135 floor of 13 U.S. personnel, six non-combat and seven combat — and the legal basis for continued operations. The Article 51 self-defense notification to the UN Security Council, submitted by the administration before the strikes, will surface in questioning about whether the legal predicate holds.

What distinguishes this hearing from its predecessors is the convergence of three threat streams that previously had separate committee jurisdictions:

- Iran as a state actor (SSCI-traditional)
- the IRGC-cartel nexus as an organized crime and border security problem (SJC and Homeland)
- the domestic radicalization vector (FBI-dominant)

All three will collide in Tuesday's testimony.

The committee will attempt to use the public hearing to establish the narrative frame before the closed session, where the actual damage assessments live.

The classified annex is almost certainly where the Khamenei status question, the MuddyWater pre-positioning of U.S. infrastructure, and the true state of Hezbollah's rocket inventory will be addressed.

The public hearing will produce headlines. The closed session will produce policy.

This intelligence assessment provides CommandEleven's pre-hearing intelligence briefing:

- what each witness will face
- what the committee factions want
- what the IC will and will not disclose publicly
- what to watch for in real time

It synthesizes the three assessments produced in this series — the IRGC's Latin America network, the Axis of Resistance in the Middle East, and the modernized Arbabsiar threat doctrine — into a single operational frame for Tuesday's testimony.

IRAN – THE CENTRAL THREAD

The SSCI's Worldwide Threats hearing has, for the past decade, treated Iran as one thread among many. In 2026, Iran is the only thread around which every other threat wraps. The committee will spend the majority of the public hearing on the post-Epic Fury environment, and understanding that environment requires a clear-eyed accounting of what the strikes achieved, what they did not, and what Iran has done since.

WHAT OPERATION EPIC FURY STRUCK

Operation Epic Fury targeted Iran's nuclear infrastructure and key IRGC command nodes. The battle damage assessment (BDA), as reported in the Financial Times and corroborated through signals intelligence, confirms degradation of centrifuge cascades at Natanz and Fordow, destruction of the IRGC Aerospace Force command complex, and strikes on at least three Quds Force logistics hubs in Tehran's western belt.

The IRGC Aerospace Force absorbed the heaviest direct losses, with drone capability reduced by an estimated 90% or more across its operational inventory.

What the BDA does not confirm, and what the committee will press on, is the timeline to reconstitution. Iran's nuclear program is now dispersed. Iran spent years, after the 2010 Stuxnet attack, building redundancy into its enrichment architecture. The centrifuge supply chain — specifically the carbon fiber and maraging steel pipeline running through UAE front companies and Chinese intermediaries — was not a primary strike target. That was a policy choice, not an intelligence failure, and the committee will want to know who made it and on what basis.

IRGC QUDS FORCE: DEGRADED, NOT DISMANTLED

The IRGC Quds Force's command structure absorbed losses in the Epic Fury strikes, but the thirty-one autonomous regional commanders the organization restructured after January 2020 are largely intact.

This is the organizational inheritance of Soleimani's death.

When the April 2024 Israeli strike in Damascus killed IRGC Brigadier General Mohammad Reza Zahedi alongside six other senior officers, the IRGC did not centralize. It dispersed further. The result is an organization that is harder to decapitate and harder to target, precisely because the targeting of leadership created evolutionary pressure toward decentralization.

The IC's assessment of current Quds Force command is that operational continuity is being maintained by tier-two commanders, who were deliberately kept outside the blast radius of senior leadership exposure.

These officers are not as strategically sophisticated as the Soleimani generation. They are more transactional, more reliant on financial incentives than ideological loyalty, and less capable of the long-horizon strategic patience that built the Axis of Resistance over four decades. That degradation is real.

It does not mean the threat is over. It means the threat is being managed by operators whose threshold for tactical escalation is lower than their predecessors'.

THE AXIS OF RESISTANCE: CURRENT OPERATIONAL STATE

The Axis of Resistance at its peak — before October 7, before the Gaza campaign, before Epic Fury — operated on an annual proxy budget of \$1.5 billion to \$2 billion, with Hezbollah receiving between \$700 million and \$1 billion, the Houthis an estimated \$200 million to \$300 million in direct support and training, and the Iraqi Popular Mobilization Force (PMF) constellation absorbing the remainder through a combination of state-allocated funds, IRGC direct transfers, and independent revenue streams from Iraqi government salaries to PMF-affiliated units.

The financial architecture has been disrupted but not severed.

The Central Bank of Iran continues to route funds through third-country intermediaries. The Hezbollah-UAE informal value transfer system — run primarily through Lebanese money exchange networks in the UAE, Senegal, and West Africa — survived Epic Fury because it predates Quds Force centralization and operates on relationship networks that are not organizationally dependent on any single command node.

Financial counterterrorism measures that target named entities and known accounts do not reach the informal hawala layer of this architecture.

HEZBOLLAH: THE 25,000-ROCKET QUESTION

The IDF's Operation Al-Asf al-Makul — launched in response to Hezbollah's resumed rocket fire after the Gaza ceasefire collapsed — is the most consequential ground operation in southern Lebanon since 2006. The 98th Division has reinforced the Litani line. Hezbollah's publicly stated post-degradation inventory stands at 25,000 rockets. At peak, before the 2024 decapitation strikes that killed Secretary-General Hassan Nasrallah, Deputy Commander Ibrahim Aqil, and radif commander Fuad Shukr, the organization maintained between 130,000 and 150,000 rockets and missiles.

The current inventory figure is contested.

The IDF puts the functional precision-guidance inventory — Fateh-110 variants, C-802 anti-ship missiles, Kornet anti-tank guided weapons — at a fraction of pre-2024 levels. The Israeli Air Force has conducted over 4,200 strikes in Lebanon since September 2024. What the committee needs to understand, and what the IC will not say publicly, is whether Hezbollah's reconstitution capacity currently exceeds its depletion rate. If Iran is still moving precision-guidance upgrade kits through Syria

— and the available intelligence suggests it is, through the Bab al-Hawa corridor running north of Idlib — then the 25,000 figure is a snapshot, not a ceiling.

The post-Nasrallah command structure is also relevant. Naim Qassem, who assumed leadership after Nasrallah's killing, does not carry Nasrallah's strategic authority within the organization. The vacancy has been partially filled by decentralized military council decision-making, which is slower, more risk-averse, and more susceptible to IRGC micro-management from Tehran.

This produces a Hezbollah that is less strategically autonomous, but more directly responsive to IRGC operational tasking — meaning less independent strategic judgment and more direct IRGC command influence over any Hezbollah homeland operation.

HOUTHİ DUAL CHOKEPOINT

The Houthis have done something no Yemeni faction in history has achieved: they have simultaneously threatened both the Bab al-Mandab strait and the Strait of Hormuz with kinetic effect.

The Red Sea campaign that began in late 2023 has, as of March 2026, removed approximately 8 million barrels per day from normal routing patterns. The bypass capacity through overland pipelines and alternative routes is approximately 6 to 6.3 million barrels per day, creating a structural oil supply deficit that has driven prices above \$150 per barrel so long as both straits remain under threat.

The Bessent statement — publicly reported and subsequently walked back — that the U.S. had confirmed no sea mines were deployed near Hormuz was assessed by U.S. Navy mine countermeasures units as factually incorrect. Approximately ten mines have been confirmed. The administration's public denial was likely a deterrence calculation designed to prevent oil market panic, but it has created an information credibility problem that the committee will probe. Treasury Secretary Bessent's statement, made without IC clearance on the underlying mine intelligence, is precisely the kind of executive-branch coordination failure that the SSCI oversight function was established to surface and address.

The Houthi Hour Zero contingency — the activation of a full Bab al-Mandab blockade synchronized with Hormuz interdiction — remains operationally live and strategically unresolved. The committee should ask whether CENTCOM has a military solution to simultaneous chokepoint closure, and whether the administration's planning assumes Iranian rational restraint on that scenario.

The Shahlai-Houthi liaison relationship establishes that IRGC Quds Force officers have been embedded in Houthi command for at least six years. Quds Force Brigadier General Abdul Reza Shahlai survived the 2020 U.S. drone strike targeting him in Yemen. His continued operational presence as the link between Tehran and the Houthi leadership means the dual chokepoint threat is being managed at the Quds Force operational level — not as independent Houthi strategic initiative.

MUDDYWATER, AWS, AND PRE-POSITIONED INFRASTRUCTURE

On March 1, 2026, the Iranian-linked threat actor MuddyWater — a component of MOIS, Iran's Ministry of Intelligence and Security, distinct from the IRGC Cyber Command, but with documented operational overlap — hit three Amazon Web Services (AWS) data centers in the UAE and Bahrain. The attack was not primarily destructive. It was reconnaissance in force. MuddyWater pre-positioned access to U.S. government contractor infrastructure hosted in those facilities.

This is the intelligence finding that will receive the least public attention on March 18 and that deserves the most.

Pre-positioning is not an attack. It is preparation.

The committee's Tier-1 assessment of this threat reflects an understanding that MuddyWater's AWS access is not about disrupting UAE cloud services — it is about establishing persistence in networks that connect to U.S. government systems through contractor and cloud service pathways. The supply chain attack model that underpinned SolarWinds in 2020 applies here with a higher degree of deliberateness. The IC knows this. The committee will want to know what the private sector has been told, what CISA has directed, and whether the contractor networks using those AWS facilities have been comprehensively audited for lateral access.

KC-135 KIA FLOOR AND THE ARTICLE 51 QUESTION

The confirmed U.S. casualty floor from Epic Fury and associated operations stands at thirteen: six non-combat deaths attributable to the KC-135 ground support incident at Al Udeid, seven combat deaths across the operational theater. An additional estimated 140 personnel have been injured. The Minab incident — 165 casualties reported in a Senate probe — has not been formally attributed, and the administration has not declassified the underlying intelligence.

Article 51 of the UN Charter — the self-defense justification invoked for the Epic Fury strikes — was formalized in a written notification to the UN Security Council

before the operation commenced. The administration's legal theory rests on Iran's material support to October 7 and subsequent attacks on U.S. forces, aggregated under a continuous armed attack doctrine that treats years of proxy-directed operations as a single ongoing armed attack rather than a series of discrete incidents requiring separate legal analysis.

The committee's Democratic members will challenge the aggregation theory.

The Republican majority will defend it.

The exchange will clarify the administration's legal exposure for potential future operations and whether the Article 51 justification was intended to cover a single operation or serves as a standing legal framework for the theater.

THE LATIN AMERICA AND US HOMELAND NEXUS

The annual Worldwide Threats hearing has historically treated Latin America as a drug trafficking and transnational crime concern, distinct from the Middle East terrorism track. That distinction has collapsed.

The IRGC's operational presence in Venezuela, the Tri-Border Area, and through cartel logistics networks inside the United States means what appears on paper as a DEA and State Department problem is now the FBI's and the SSCI's problem simultaneously.

VENEZUELA: STATE CAPTURE AS STRATEGIC ARCHITECTURE

The Maduro government has not merely tolerated IRGC presence — it has institutionalized it.

The Bolivarian National Intelligence Service, SEBIN, has accepted training, surveillance technology, and operational methodologies from MOIS dating to at least 2010. Iranian-flagged cargo flights — the "ghost flights" documented by the Foundation for Defense of Democracies and confirmed in the 2022 Southern Command (SOCOM) posture statement — continued through 2025 with Venezuelan diplomatic cover providing cargo immunity from inspection.

The eleven Venezuelan officials currently under the Office of Foreign Assets Control (OFAC) sanctions for IRGC facilitation are not mid-level operators. They include personnel from the presidential protective detail and from the Finance Ministry's parallel fund transfer architecture.

This is not corruption in the conventional sense.

It is a deliberate policy of state actors using state mechanisms to provide cover for a foreign intelligence service's Western Hemisphere operations. The Venezuelan state is not a passive host — it is an active operational partner.

The Department of Justice indictments in the Amir Ardebili case and subsequent Venezuela transshipment prosecutions established that Venezuelan territory was used as a staging point for export-controlled U.S. military components bound for Iran. That legal record now provides the predicate for a much larger question the committee will raise on March 18: *what else has been moved through Venezuela, under what diplomatic cover, and what is currently in transit or pre-positioned on Venezuelan soil?*

THE TRI-BORDER AREA: BARAKAT NETWORK AND CRYPTO INFRASTRUCTURE

The Tri-Border Area (TBA) of Paraguay, Brazil, and Argentina has been a documented Hezbollah financial base since the early 1990s. The 1994 Buenos Aires AMIA bombing — orchestrated by Imad Mughniyeh with IRGC backing, confirmed by Argentina's federal judiciary after a two-decade investigation — established that the TBA is not merely a fundraising location, but a project management hub for Western Hemisphere operations.

The AMIA case established the prosecutorial record that allows U.S. prosecutors to treat TBA-linked financial flows as terrorism financing rather than organized crime.

The Barakat network — centered on Assad Ahmad Barakat, designated by Treasury in 2004 and assessed as the TBA's primary Hezbollah financial manager — has adapted to the post-2010 financial counterterrorism environment. The network's core financial function now includes cryptocurrency conversion. Akil Rada, identified in 2024 intelligence reporting as managing the Barakat network's crypto operations, processes USDT on the Tron blockchain through Venezuelan exchange nodes before converting to local currencies for operational use. This is the same blockchain rails architecture that CJNG uses for cross-border payments to U.S. distributors.

The overlap is not coincidental — it reflects a shared infrastructure that criminal and terrorist networks alike have migrated to because the monitoring architecture built after 9/11 does not natively surveil Tron blockchain transactions.

What this means in practice: a Hezbollah fundraising cell in Ciudad del Este can send money to an operational cell in the United States using the same infrastructure that the Sinaloa Cartel uses to pay Los Angeles distributors.

SWIFT monitoring, correspondent banking controls, and FinCEN suspicious activity reports — the pillars of post-9/11 financial counterterrorism — are structurally blind to this channel.

CJNG AND THE 35-CITY INFRASTRUCTURE

The Cartel Jalisco Nueva Generación (CJNG) has operational cells in more than 35 U.S. cities, as of the current FBI assessment. This figure is not disputed by the IC. What is disputed is the nature of those cells' relationship to any IRGC tasking architecture.

The cartel-IRGC nexus has been documented at the level of individual transactions — the \$1.5 million payment structure in the 2011 Arbabsiar plot is the clearest case — but a sustained command relationship between current CJNG leadership and active Quds Force operational officers has not been publicly confirmed.

The distinction matters legally and practically.

A cartel that accepts payment for a specific operation is a law enforcement problem, manageable through existing prosecutorial tools. A cartel that has been converted into a persistent IRGC operational asset is a national security emergency requiring a different response.

The committee will push on where exactly the IC currently assesses CJNG's position on that spectrum.

The honest answer is that the IC does not know, and the collection against domestic cartel cells is constrained by civil liberties architecture that was not designed for this threat environment.

FOUR DOMESTIC KINETIC EVENTS AND THE LONE ACTOR ASSESSMENT

Four domestic kinetic incidents in the ninety days preceding the hearing have converged on a single threat profile: ***lone-actor, self-radicalized, IRGC-adjacent inspiration without confirmed IRGC operational direction.***

The incidents at Old Dominion University, Austin, Gracie Mansion in New York, and Detroit are distinct in their tactical specifics but consistent in the ideological framing the perpetrators or planning cells used — framing that draws directly from the IRGC's English-language and Farsi-language content ecosystem.

With lone-actor probability assessments at 93%, this reflects a pattern and its structural intractability. The lone-actor model is the hardest for the FBI to disrupt because it does not require a network. There is no cell to penetrate, no communication to intercept, no financial transaction to flag. The threshold for activation is not an order from a commander.

It is the internal decision of an individual who has absorbed sufficient radicalization material to act.

The FBI's domestic terrorism division has increased its IRGC-inspired monitoring posture since the Arbabsiar plot. The committee will ask Patel how that monitoring posture applies to individuals who have not crossed a legal threshold — who are

radicalized but not yet operational. The answer touches civil liberties in ways that will generate disagreement on the committee, and that disagreement will surface in the exchange between Patel and Democratic members.

SOUTHERN BORDER AS LOGISTICS ARCHITECTURE

The southern border's relevance to the Iran threat is not primarily about individual infiltration. It is about infrastructure. The criminal smuggling networks — Sinaloa, CJNG, Zeta successor organizations — have built a logistics architecture capable of moving anything from Central America to U.S. interior cities with high reliability.

The same routes, safe houses, and payment networks that move fentanyl also move people, documents, and — if instructed — materials.

CJNG's 35 U.S. city cells are the domestic endpoint of that infrastructure. The Zeta successors control significant segments of the Tamaulipas-Texas border crossing architecture. These are not abstract capabilities. They are functional logistics systems that an IRGC operational cell would use the same way a shipper uses a freight network — not because of ideological alignment, but because the infrastructure exists and accepts payment.

THE ARBABSJAR DOCTRINE – THEN AND NOW

The 2011 Manssor Arbabsjar plot has never been fully resolved by the U.S. national security establishment. It was prosecuted. Arbabsjar pleaded guilty, received a 25-year sentence, and is currently serving at a federal facility. His handler, Gholam Shakuri, a Quds Force officer operating under alias in Tehran, was indicted and never extradited. Shakuri and his superior in the operation, Quds Force Brigadier General Abdul Reza Shahlai, remain at large.

Shahlai is not a historical figure. CENTCOM placed a \$15 million reward on him. He survived a January 2020 drone strike targeting him in Yemen. He remains an active Quds Force commander. **He is the institutional memory of the Arbabsjar operation — he knows what it attempted, he knows why it failed, and he has had fifteen years to build a version that does not fail for the same reasons.**

OPERATIONAL ANATOMY OF THE 2011 PLOT

The Arbabsjar operation was operationally unsophisticated and strategically ambitious in a combination that defined its failure. Arbabsjar — an Iranian-American used car dealer with dual citizenship — was recruited by his cousin Shahlai with a single target: Saudi Ambassador Adel al-Jubeir, to be killed at Café Milano in Washington, D.C. The weapon was a bomb. The executor was to be a Mexican cartel contact that Arbabsjar believed he was developing through a business connection in Texas.

That contact was a DEA informant. The entire operation ran on a single human intelligence asset who happened to be working for the other side. The \$1.5 million payment — \$100,000 as down payment, the remainder to follow on completion — was transferred to an account controlled by the DEA. Arbabsjar was arrested on his return to the United States.

The Arbabsjar failure has one root cause: single-source dependency. The operation had no redundancy, no verification mechanism, no independent visibility into whether the cartel contact was genuine.

In intelligence terms, it was an amateur operation run by a capable intelligence service that outsourced a sensitive task to a low-reliability asset without verification.

The Quds Force drew the correct lesson.

It has not made the same structural mistake since.

THE 2026 ARCHITECTURE

The modified plot architecture that the IC's threat assessment describes is built on exactly the lessons of Arbabsiar's failure:

- thirty-one autonomous regional Quds Force commanders maintain separate relationships with distinct cartel organizations
- no single commander manages the full operational picture
- the communication architecture — USDT on the Tron blockchain, encrypted messaging through Telegram channels, and dead-drop methodology for physical meetings — does not run through any single node
- CJNG's 35-plus U.S. city cells provide execution capacity without operational knowledge

A cell in Los Angeles does not know that the target development being conducted in Washington is part of the same operation.

The financial payment — crypto-converted to cash at the destination — does not create a traceable wire transfer.

The activation threshold is tied to the Epic Fury damage assessment. The committee should understand that ***the IRGC has pre-positioned assets at an activation threshold, not at an operational order.***

The trigger is not a command — it is a condition.

If the condition is met, cells that have never received an explicit order will interpret the signal and act.

This is a ***doctrine of distributed autonomous activation***, and it is the architecture that the FBI's disruption model was not designed to counter.

THE COORDINATED ATTACK SCENARIO

The complex coordinated attack scenario that now represents the IC's high-end threat assessment uses a four-organization architecture:

- Sinaloa for financing and logistics
- CJNG for execution
- Zeta successor organizations for border crossing infrastructure
- Hezbollah's domestic network for target development

None of these four organizations need to know they are part of a coordinated operation. Sinaloa moves money because it is paid to move money. CJNG cells execute because they have received a contract. Zeta successors provide border infrastructure because they are paid transit fees. Only the Hezbollah domestic network — which conducts target development, identifies vulnerabilities in high-value targets, and maintains the operational picture — is acting with full knowledge of the operation's strategic purpose.

This architecture defeats the FBI's standard disruption methodology.

A network disruption operation requires identifying a network. A four-organization operational architecture with transactional, not ideological, inter-organizational relationships does not look like a network on social graph analysis. It looks like four separate crime problems — a financial crime, an organized crime cell, a border violation, and a surveillance operation — none of which individually triggers a terrorism investigation threshold.

THE SHAHLAI QUESTION AND THE COMMITTEE'S OBLIGATION

The SSCI should ask, on the record, why Abdul Reza Shahlai has not been brought to justice. The January 2020 CENTCOM attempt failed. The \$15 million reward has produced no actionable intelligence. Shahlai's operational status as an active Quds Force commander means he is, at this moment, one of the most consequential untargeted individuals in the IRGC's command structure. If the 2026 version of the Arbabsiar architecture is being planned, Shahlai is among the most likely architects.

LIKELY LINES OF QUESTIONING

The March 18 hearing will surface predictable arguments from predictable factions. Understanding what each faction wants before the hearing provides a basis for interpreting what the witnesses say — and more importantly, what they do not say.

REPUBLICAN MAJORITY: VINDICATION AND ESCALATION AUTHORITY

The Republican majority on the SSCI arrives at this hearing wanting three things: confirmation that Epic Fury was legally justified, an assessment that it strategically degraded Iran's capabilities, and assurance that the IC is positioned to support potential follow-on operations.

CIA Director John Ratcliffe will be pressed on the nuclear reconstitution timeline. The specific question — how long to Iranian breakout post-Epic Fury? — is the metric by which the administration's success claim will be evaluated. If Ratcliffe's answer is more than two years, the Republican majority can declare strategic success. If the answer is less than eighteen months, the hearing becomes a debate about whether the strikes achieved their stated objective and what comes next.

There will also be a heavy focus on Venezuela, Cuba, and the Western Hemisphere IRGC presence. DNI Director Tulsi Gabbard will be pushed on whether the DNI's assessment of Venezuela as a state sponsor of terrorism in everything but formal designation has changed the administration's policy calculus.

If the DNI assesses Venezuela as an active IRGC operational base — which the intelligence supports — the formal State Sponsor of Terrorism designation becomes a policy question with significant sanctions implications.

Cyber will also be discussed in detail due to the MuddyWater/AWS attack and the pre-positioning finding are in his lane. Questions will attempt to establish whether the private sector — specifically Amazon Web Services — is cooperating fully with the IC on damage characterization, access revocation, and remediation. Expect Center 795, the IRGC-linked computational infrastructure identified in the March 2026 signals intelligence sweep, and what its existence implies about the scope of Iranian offensive cyber preparation to also be discussed in depth.

DEMOCRATIC MINORITY: CASUALTIES, LEGAL BASIS, AND OVERSIGHT

The Democratic minority will want accountability.

The KC-135 casualty floor, the thirteen confirmed KIA, the Minab incident and its disputed attribution, and the disconnect between administration public statements and casualty intelligence will face heavy scrutiny.

Expect specific targeting of Bessent mines statement. A Treasury Secretary publicly denying confirmed intelligence on sea mine deployment is the kind of executive-branch coordination failure that the SSCI oversight function was created to address. Ratcliffe will be asked whether CIA advised Treasury before Bessent's statement.

The answer will be revealing regardless of what it is.

If CIA was not consulted, that is an intelligence-policy coordination failure. If CIA was consulted and supported the false statement, that is a different and more serious problem.

The legal architecture of Epic Fury will be attacked with characteristic precision. The Article 51 notification establishes a self-defense claim, but the aggregation theory — treating Iran's continuous proxy support as a single ongoing armed attack — has not been reviewed by any court and was not submitted to Congress for authorization. Gabbard and Ratcliffe will have to demonstrate whether the administration believes future operations against Iranian-backed forces — Hezbollah, the Houthis, Iraqi PMF — are covered under the existing Article 51 justification, or whether new authorization would be required. The answer has implications for every subsequent military action in the theater.

The Democrats, will focus on cyber and AI. The Center 795 findings and the Maven AI coherence risk that the Modern War Institute flagged in its assessment of DoD-wide AI integration will provide the basis for questioning.

Democrats will want to know whether the IC's AI-assisted threat assessment tools are introducing coherence risk — producing internally consistent but factually questionable threat pictures because the models optimize for narrative coherence over accuracy.

This is a question that goes to the epistemic reliability of the Worldwide Threats assessment itself.

WHAT PATEL WILL AND WON'T SAY

Kash Patel is the witness whose testimony will be the most politically charged and the least analytically useful. His FBI is managing four domestic kinetic incidents, a 93% lone-actor probability assessment, a confirmed IRGC-Sweden Foxtrot Network

— corroborated through MI5 collaboration — and MI5's own count of twenty-plus Tehran-directed plots against UK targets in 2025.

Patel will emphasize operational disruptions and arrests. He will not discuss pre-operational monitoring methodology in detail. He will deflect questions about FISA warrant applications related to IRGC-adjacent targets on civil liberties grounds. His prepared statement will focus on the domestic threat with enough specificity to be alarming but not enough to reveal collection methods or pre-operational case details.

The committee's most productive line of questioning for Patel is not about current cases. It is about the activation threshold.

If the IRGC has pre-positioned domestic assets at a condition-based activation threshold — not awaiting an explicit operational order but awaiting a condition — the FBI's standard disruption model may not be adequate.

The committee should ask whether the Bureau has developed a doctrine for disrupting a distributed activation network whose individual nodes have not yet crossed a legal threshold sufficient for arrest or FISA surveillance.

THE GABBARD FACTOR

Tulsi Gabbard's testimony will be the most watched and the most scrutinized. As DNI, she controls the public release posture of the National Intelligence Estimate on Iran — which has not been publicly released since Epic Fury. Her decisions on what to declassify for this hearing will shape the public's understanding of the threat environment for the next twelve months.

Gabbard has previously expressed skepticism about IC consensus assessments and about the institutional culture of intelligence community groupthink. The committee's questions about IC analytic methodology — specifically about whether the Khamenei status intelligence has been adequately corroborated before reaching the policymaking level — will play directly to her documented concerns. She may use this hearing to make a public argument for analytic reform that goes beyond Iran.

The wildcards in her testimony are the two subjects she cannot discuss publicly: Khamenei's operational status, and the full scope of MuddyWater's U.S. infrastructure pre-positioning.

Both are almost certainly in the classified annex.

How she handles the public portions will signal what the closed session will contain and — more importantly — what policy decisions are pending that information.

INTELLIGENCE GAPS AND CONTESTED ASSESSMENTS

The SSCI's Worldwide Threats hearing is not designed to surface intelligence gaps. It is designed to present the IC's assessed understanding of the threat environment. The gaps are what the committee has to work to extract, and the witnesses are trained to navigate around them without lying.

THE KHAMENEI STATUS PROBLEM

The most consequential piece of contested intelligence in the current environment is the Khamenei status assessment. Multiple Axis-aligned sources — including at least one Tier-2 source with demonstrated access to senior Islamic Republic deliberations — have framed Khamenei's health in terms suggesting incapacity or imminent succession planning. The IC has not corroborated this assessment through independent collection.

The problem is structural. Iran's senior leadership health information is among the most closely guarded state secrets in the world. The IRGC's internal communications about succession planning are not accessible through signals intelligence under normal collection conditions. Human sources inside the leadership's inner circle are extraordinarily rare. The IC is making an assessment about the most consequential political variable in the Iran threat picture based on partial information — and it knows it.

This is relevant to everything the committee will discuss.

An Iran with a debilitated or transitional supreme leader is a different threat calculation than an Iran with a fully functional Khamenei issuing strategic guidance.

The succession faction inside the IRGC — whose interests may not align with post-Epic Fury restraint — may have more operational latitude than the IC's standard threat model assumes. The committee should ask Gabbard directly: is the current NIE on Iran premised on Khamenei's operational capacity, and what is the alternative assessment if that premise is wrong?

THE BDA COMPLETENESS QUESTION

The Financial Times battle damage assessment and the IC's own BDA are not fully synchronized. The FT reporting — based on satellite imagery and open-source signals — suggests damage consistent with the administration's public claims. The IC's classified BDA, based on signals and human intelligence, may present a more qualified picture.

The nuclear program question is the most critical.

Destroying centrifuge cascades does not destroy institutional knowledge, engineering expertise, or the physical plant for rebuilding. The procurement networks that supply carbon fiber and maraging steel to the Iranian nuclear program are distributed across China, Turkey, South Korea, and Southeast Asia.

If those networks are intact — and there is no evidence they were targeted — the reconstitution timeline is a function of political will and procurement speed, not technical capacity. The committee should ask Ratcliffe for the classified reconstitution timeline under the assumption that procurement networks are fully functional, not just the best-case timeline that assumes they have been disrupted.

PALANTIR MAVEN AI COHERENCE RISK

The Modern War Institute's (MWI) assessment of DoD-wide AI integration — specifically the Maven Smart System's deployment across the intelligence-to-targeting pipeline — raises a problem that the SSCI is not yet equipped to fully process. AI systems trained on large bodies of intelligence reporting produce internally consistent threat pictures that can be wrong in ways that human analysts would not be, because the models optimize for coherence rather than accuracy.

The MWI AI coherence risk assessment suggests that the Maven system's threat scoring methodology may produce confident assessments in areas where the underlying data is thin, precisely because thin data, when processed by a model trained on decades of intelligence reporting, gets pattern-matched to familiar threat archetypes. The IRGC-cartel nexus is one such archetype. The model has been trained on Arbabsiar. Every subsequent case pattern-matches to Arbabsiar. The committee should ask whether any of the current domestic threat assessments have been validated against the underlying raw intelligence, independent of the AI-assisted processing layer.

AQAP: THE ANTI-CHINA PIVOT AND THE AWLAKI LEGACY

Al-Qaeda in the Arabian Peninsula's (AQAP) documented shift toward anti-China targeting — accelerating since 2024 and now publicly attributed in NCTC open-source reporting — is an intelligence gap that the SSCI has not yet fully incorporated into its threat assessment framework.

AQAP's anti-China pivot has two drivers: the Chinese security partnership with Saudi Arabia and Gulf states that AQAP frames as apostasy, and the Uyghur dimension of China's Xinjiang policy, which AQAP has incorporated into its jihadist

narrative framework. The latter creates an ideological bridge to audiences that were previously resistant to AQAP framing.

Anwar al-Awlaki's operational legacy — the Yemen-based English-language radicalization infrastructure he built before his 2011 killing — is being reconstituted under new management. The online radicalization pathway that runs from AQAP's English-language content through social media to lone-actor activation does not require a direct AQAP command relationship. It requires only that an individual find and absorb the material. The IEP lone-actor assessment at 93% is partly a function of this pathway's continued accessibility and reach.

AL QAEDA PHASE 3: THE SAIF AL-ADEL FACTOR

al Qaeda's current global strategic posture reflects a Phase 3 architecture that Michael Morell, former CIA Acting Director, publicly flagged as a major attack threat in testimony and podcast commentary in 2025. The NCTC September 2025 warning on AQ reconstitution — under Saif al-Adel's leadership — describes an organization that has used the Iran-AQ operational accommodation to rebuild strategic planning capacity.

Saif al-Adel is supposedly managing AQ's global network from Iranian territory. This is not an alliance — it is a transactional accommodation in which Iran provides safe haven and AQ provides a deniable instrument of pressure that Tehran can point toward without formal command authority.

The committee should understand that the AQ Phase 3 threat and the IRGC homeland threat share a geographic base — both are being managed from Iranian territory — even as they represent distinct command structures and operational doctrines.

ISKP: AZERBAIJAN AND BALOCHISTAN

The Islamic State Khorasan Province (ISKP) has opened two fronts that the committee should understand as distinct from the core Afghanistan-Pakistan theater: the South Caucasus and Balochistan.

The Azerbaijan front reflects ISKP's strategic calculation that the South Caucasus is undergoverned in the security sense, has Sunni-majority population clusters, and is accessible from multiple directions. The Nagorno-Karabakh displacement of Azerbaijani Karabakhi populations and the Armenian security vacuum in the southern corridor have created movement opportunities that ISKP has exploited for transit and recruitment. An ISKP-Azerbaijan Caucasus front extends the

organization's operational geography into a region bordering Russia, Turkey, Georgia, and Iran simultaneously.

The Balochistan safe-haven risk reflects a different dynamic: Pakistani counterterrorism operations in the tribal areas have pushed ISKP elements south and west into terrain where BLA (Balochistan Liberation Army) and BRN (Balochistan Republican Nationalist) activity provides environmental cover and where Pakistani state security penetration is limited. The convergence of Sunni jihadist and Baloch ethnonationalist organizational space in Balochistan is not an alliance — but it is a shared geographic footprint that complicates targeting for both ISI and AFSOC.

EU CLUSTER: 3+1 THREATS

The European threat picture — Belgium, Norway, and Denmark, with Detroit as the fourth domestic U.S. incident with EU-linked inspiration — represents a 3+1 cluster that the committee has not yet addressed as a coordinated threat stream. The EU three are distinct in their operational specifics but share IRGC-West connectivity through the Sweden Foxtrot Network, MI5's documented twenty-plus Tehran plots in the UK in 2025, and IRGC operatives documented in Belgium running parallel surveillance consistent with the al-Jubeir plot methodology.

The +1 — Detroit — is the domestic incident with the most documented links to the EU radicalization pipeline. The subject in the Detroit incident had online interactions with individuals connected to the Belgium network. This is not a command relationship. It is a radicalization contagion that crosses jurisdictions and, by crossing them, defeats the legal-geographic boundaries that structure the IC's domestic-international intelligence division.

WHAT TO WATCH FOR

The March 18 hearing will produce a public record that analysts will parse for the next twelve months. The value is not in the prepared statements — those will be released in advance and will contain precisely what the witnesses want the public to know.

The value is in the exchanges, in the hedges, and in the non-answers.

WATCH FOR TENSE CHANGES

When intelligence officials discuss ongoing threats, tense is everything.

- "Iran has been building" is a historical statement
- "Iran is building" is a current assessment
- "Iran remains capable of building" is an IC hedge that means the current collection picture is unclear

When Ratcliffe discusses the nuclear reconstitution program, listen for tense shifts. A move from present continuous to conditional or modal language signals that the IC's current collection on that program is degraded or contested internally.

The same applies to the domestic threat.

"We have been monitoring" is different from "we are monitoring."

"We disrupted several plots" is different from "we are disrupting active plots."

The prepared statement will use active present tense throughout.

The exchange with committee members is where tense shifts appear, because witnesses respond to specific questions with the precision that specific questions require.

WATCH FOR "WE HAVE NO INFORMATION THAT..."

This formulation is not a denial. It is a collection gap acknowledgment that functions as a legal non-lie. "We have no information that Iran has deployed additional assets to Venezuelan territory" means: we don't know. It does not mean they haven't.

When Gabbard uses this formulation on the Khamenei status, the MuddyWater pre-positioning scope, or the domestic activation threshold, write it down.

Those are the questions that belong in the closed session.

WATCH FOR THE BESSENT QUESTION

How Ratcliffe responds to the question about sea mine intelligence and the Bessent public statement will reveal the state of IC-policymaker coordination under the current administration. If he says "I can't discuss that in open session," that is a tell — the answer is damaging enough to warrant classification. If he says "Secretary Bessent's statement reflected the policy decision to..." he is telling the committee that the IC was consulted and chose to support a public statement it knew was inaccurate. Either answer is news. There is no version of this response that is not revealing.

WATCH FOR PATEL'S ACTIVATION THRESHOLD LANGUAGE

If Patel uses the phrase "pre-operational" in the context of domestic IRGC-linked cells, that is the most important word in the hearing. **Pre-operational means the FBI has identified individuals or cells who have not yet crossed a legal threshold but who are assessed as preparing for action.**

This is the Bureau's most uncomfortable disclosure because it reveals the limits of its legal disruption authority.

If Patel avoids the term entirely and frames all domestic threats as "under investigation" or "actively monitored," he is **signaling that the FBI does not want to disclose the scale of pre-operational cases it cannot legally disrupt.**

The gap between "monitored" and "pre-operational" is the civil liberties frontier — and it is where the IRGC's activation threshold doctrine is specifically designed to operate.

WATCH FOR THE AL-QUDS DAY REFERENCE

The hearing takes place three days after Al-Quds Day — the annual pro-Palestinian, anti-Israel, anti-American mobilization observed on the last Friday of Ramadan.

Intelligence agencies monitor Al-Quds Day IO amplification as an operational signal environment — the amplification period generates cover for actual operational communications and activation signals.

If any witness references Al-Quds Day in their testimony, it means they are seeing something in the current operational environment that they want on the public record without specificity.

WATCH FOR THE CLOSED SESSION REQUEST

If any witness requests to move a specific line of questioning to closed session during the public hearing, the subject of that question is the most important intelligence disclosure of the day. The Khamenei status question, the full MuddyWater pre-positioning scope, and the complete domestic kinetic activation picture are the three subjects most likely to trigger this response.

A closed session request by Gabbard on the Khamenei question would be the single most significant signal of the hearing — it would mean the IC's assessment is alarming enough that the DNI judges public disclosure destabilizing.

WATCH THE BODY LANGUAGE ON THE NUCLEAR TIMELINE

The nuclear reconstitution timeline is the strategic center of gravity for everything that happens after March 18. If Ratcliffe gives a crisp, confident answer — "two to three years" — the committee can calibrate its next oversight cycle accordingly. If he hedges, qualifies, or requests that his full answer be provided in writing for the classified record, the true assessment is more alarming than the public answer.

A hedged reconstitution timeline means one of three things: the IC's collection is degraded and it doesn't know; the IC has a classified assessment that contradicts the public framing of Epic Fury as a strategic success; or the procurement networks that feed the program are intact and the timeline depends on Iranian political will rather than technical capacity.

All three scenarios have significant policy implications. All three will end up in the classified annex.

WATCH FOR THE MAVEN QUESTION

If AI coherence risk in the Maven assessment pipeline, watch how Gabbard responds. A dismissive answer is the institutional deflection. A substantive engagement with the coherence risk question would signal that the DNI's office has reviewed the Modern Warfare Institute (MWI) critique and either accepts or contests its finding. The latter would be a significant disclosure about how the current Worldwide Threats assessment was produced and whether it should be trusted at face value.

CONCLUSION AND ASSESSMENT

The March 18 SSCI Worldwide Threats hearing will generate headlines, political friction, and probably one or two genuine intelligence disclosures that will take days to fully process. Here is the frame within which to evaluate what you hear.

THIS HEARING IS NOT ABOUT IRAN'S PAST. IT IS ABOUT IRAN'S NEXT MOVE

The IC witnesses know things they will not say publicly. The most important of those things is what the IRGC's activation threshold actually is — what specific condition, reached in the post-Epic Fury environment, would trigger the domestic and regional operations that the Quds Force has pre-positioned to execute. That threshold is classified for a reason: publishing it changes Iranian calculus on whether to cross it.

What the public hearing will establish is the framework. Epic Fury has changed the threat from one of gradual escalation — managed through the Axis of Resistance's proxy architecture, in which Tehran maintains deniability and controls the pace — to one of potential sudden escalation, in which the IRGC's thirty-one autonomous commanders make individual calculations about whether the threshold condition has been met. The danger is not a single Iranian decision to attack. It is thirty-one Iranian decisions, made independently by officers with lower strategic sophistication than their predecessors, converging on the same conclusion at approximately the same time.

That convergence scenario is the one that neither the IC nor the policymaking community has fully war-gamed. The Arbabsiar model assumed a centralized operational decision. The 2026 architecture assumes distributed autonomous activation. The committee should leave Tuesday's hearing asking whether the current deterrence posture is calibrated for the threat it is actually facing.

THE CARTEL-IRGC QUESTION WILL NOT BE RESOLVED TUESDAY

The committee will debate whether CJNG's 35 U.S. city cells represent a latent IRGC capability or a separate crime problem. The witnesses will not give a definitive answer because the IC does not have one. The relationship is transactional, not organizational. It may already have been activated for specific tasks that have not been detected. The only way to know is collection — and the collection against domestic cartel cells is constrained by civil liberties architecture that was designed for a different threat environment.

The Arbabsiar doctrine, in its 2026 form, bypasses exactly those constraints. It does not require a detectable command-and-control relationship. It requires only that a payment be made through a clean cryptocurrency channel, a task be defined in terms that a cartel cell will execute for money, and no member of the cell have any knowledge of the strategic purpose. This is the threat the Bureau cannot easily disrupt, and the committee should leave March 18 with a clear-eyed understanding of that gap — and of what legislative or executive action would be required to close it.

WATCH THREE VARIABLES AFTER THE HEARING

Three variables will determine how the post-March 18 threat picture develops.

First, whether Al-Quds Day generated any operational signal above the standard IO amplification pattern. The intelligence monitoring window is 48-72 hours post-Al-Quds Day. If anything surfaces in that window before the hearing, it may appear in Tuesday's testimony as context.

Second, whether the administration declassifies the Minab attribution before or after the closed SSCI session. The 165-casualty Minab incident is the most contested piece of the Epic Fury damage picture. If it is formally attributed to Iranian action before the hearing, it changes the casualty accounting in ways that affect the administration's legal and political exposure. If attribution remains classified through the hearing, expect Warner to use the closed session aggressively on this point.

Third, whether Hormuz reopens on or near the March 27 estimate, and what happens to oil markets and IRGC posture if it does not. The mine clearance timeline is dependent on Iranian cooperation or CENTCOM unilateral action. If Iran delays and mines remain in place past March 27, the structural oil deficit deepens, market pressure intensifies, and the administration faces a decision about whether to escalate mine clearance operations militarily. That decision will land in the SSCI's lap before it lands anywhere else.

If all three resolve without escalation, the post-Epic Fury equilibrium holds and the IC's pre-hearing assessment will prove accurate. If any one of them generates an unexpected signal, the March 18 hearing becomes the last hearing before the threat picture fundamentally changed — and the committee will wish it had asked harder questions in the public session.

THE FINAL ASSESSMENT

This is not a hearing about what Iran did. It is a hearing about what Iran will do next, and when, and through whom. The three witnesses will give the committee as complete a public picture as the classification framework allows. The complete picture is in the closed session.

For CommandEleven's audience:

- read the prepared statements when they drop Tuesday morning
- watch the live testimony for the hedges, the tense changes, and the closed session requests
- the Khamenei status question, the Bessent mine statement, the domestic activation threshold, and the nuclear reconstitution timeline are the four subjects most likely to generate more heat than light in public and more clarity than comfort in the classified annex.

The hearing ends Tuesday afternoon. **The threat does not.**



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