THE STATE OF ISRAEL'S NATIONAL SECURITY

DOCTRINE AND POLICY GUIDELINES FOR 2025–2026

iNSS

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THE STATE OF ISRAEL'S NATIONAL SECURITY:
DOCTRINE AND POLICY GUIDELINES FOR 2025–2026

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THE INSTITUTE FOR NATIONAL SECURITY STUDIES

The mission of the Institute for National Security Studies (INSS) is to support Israeli policy and decision-makers—both professional and elected—in shaping policies that ensure Israel's future as a secure, prosperous, Jewish, and democratic state, with a solid Jewish majority and defensible, recognized borders.

INSS is staffed by a diverse team of researchers with experience in the security establishment, government institutions, and academia who systematically and continuously analyze the strategic issues Israel is facing.

INSS research-based findings and insights, along with its other various initiatives—including conferences, strategic dialogues with parallel institutions and governments worldwide, training programs, and public outreach—all aim to produce practical policy recommendations. Implementing these recommendations will bolster Israel's national security and global standing, while enhancing both domestic and international discourse on Israel, among professionals and the public alike.

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Foreword – Maj. Gen. (res.) Tamir Hayman, Executive Director

As a new era unfolds in the Middle East, in which Israel continues to fight a war whose goals and objectives have not yet been fully achieved, Israeli decision makers and the public are hereby presented with the National Security Doctrine and Policy Guidelines for 2025-2026. This document has been formulated over recent months by the various experts at the Institute for National Security Studies (INSS) and is offered as a professional and ethical compass for the defense establishment, as well as a foundation for public discourse and strategic thinking.

On October 7, 2023, the Jewish people suffered the most devastating disaster since the Holocaust. All those entrusted with Israel's security—the political leadership, the defense establishment, and others connected to national security, including civil society organizations and research institutes—failed, whether through direct responsibility or indirect association. The crisis and ensuing war have taught us a lesson in humility and the importance of doubt. As researchers, we do not claim a monopoly on truth, and this document is no exception. However, in light of these hard-earned lessons, we present INSS's policy recommendations, fully aware that prophecies are made for fools and that events unfold rapidly. Any attempt to craft a long-term policy carries the risk of hubris.

For this very reason, this document holds particular significance—it represents an effort to propose a stable strategic vision for Israel and recommend policies that can withstand the test of time and change. If reality shifts or the underlying assumptions prove incorrect, then this document will lose its validity, and we will need to revise it accordingly. Moreover, even in the face of fundamental changes, a shared conceptual framework remains valuable, as it provides a basis for adaptation. The national security doctrine outlined here enables responsible adjustments and a rigorous examination of past events compared to expectations and assessments. Furthermore, a written policy framework allows for flexibility and the courage to change course without losing sight of Israel's core values and long-term security interests. This is the essence of this document's importance.

We hope that the policy recommendations formulated by INSS will be adopted by the State of Israel. As a policy-oriented research institute, we will work to promote their implementation and influence decision-making accordingly.

After months of war, the time has come to leverage Israel's military achievements for diplomatic gains, conduct a thorough inquiry, and establish a state commission of investigation. This commission must clearly and transparently present to the Israeli public what happened on that dreadful day of October 7, 2023, and who bears responsibility for the failures. Everyone involved in Israel's security in recent years must be held accountable—including the author of these very lines.

May we succeed in our life's mission: ensuring Israel's existence, security, and prosperity.

Major General (Res.) Tamir Hayman,
Executive Director

Abstract

Contemporary Israel, probably more than ever before, requires a widely accepted national security doctrine—grounded in the values of Israel's **Declaration of Independence**. Its overarching objectives are to ensure Israel's security, prosperity, and Jewish-democratic character, with a firm Jewish majority and defensible, recognized borders.

The current war has reshaped the Middle East amid a global struggle between forces seeking to dismantle the liberal order and those upholding it. In this context, the region is witnessing a three-way contest: Iran's so-called "Axis of Resistance," the Muslim Brotherhood (backed by Turkey and Qatar), and a coalition of moderate states—including Israel, Egypt, Jordan, and the Gulf states—striving for stability and shared progress.

The weakening of both Iran's axis and Hamas presents Israel with risks and a variety of opportunities. Possibly for the first time, there is potential to pursue a bold diplomatic-security vision: resolving the Israeli-Palestinian conflict from a position of strength while deepening strategic ties with the Gulf states in order to weaken and isolate Iran. Such a network could lay the foundation for a regional bloc that enhances the global standing of its members.

Main Policy Recommendations, by Region

Global Arena

Israel is advised to strengthen U.S. ties through a defense pact, reinforce bipartisan support, and engage American Jewry. To prevent diplomatic isolation, Israel must emphasize shared democratic values with the West—an effort aided by progress made on the Palestinian issue.

Regional Arena

Iran: Israel must prepare for three scenarios:

A new U.S.-Iran nuclear deal – Israel should shape, not resist, negotiations to ensure Iran never acquires nuclear weapons.

An Iranian nuclear breakout – This would require an immediate military response, ideally coordinated with the United States.

A prolonged stalemate – Economic pressure and covert operations should continue to weaken the regime.

Syria: Three potential outcomes require distinct countermeasures:

An Islamist state – Israel must counter jihadist threats near its borders.

A stabilized Syria with a moderate government – Israel should establish discreet ties to monitor developments.

A fractured Syria – Israel should support moderate factions to prevent instability from spilling over.

Turkey: Given Ankara's role in political Islam, Israel should monitor it as a potential threat—but not as part of a reference threat for military buildup—while maintaining diplomatic engagement. Israel should also push for an end to Turkey's trade boycott.

Lebanon: Israel must prevent Hezbollah's military buildup and enforce the 2024 ceasefire agreement and UNSC Resolution 1701. If Lebanon stabilizes, Israel should pursue border agreements and even peace talks.

The Palestinian Arena

Israel must prioritize the return of all hostages, even at the cost of a ceasefire and IDF withdrawal from Gaza. Israel must also retain full security control of the Gaza Strip (resembling Area B in Judea and Samaria) in order to prevent Hamas from rebuilding

its capabilities. Gaza's civilian governance should be transferred to a non-partisan neutral Palestinian entity (without Hamas or Fatah involvement), supported regionally and internationally.

A diplomatic roadmap for Israeli-Palestinian separation is essential. Given past failures and current realities, the framework must therefore be redefined with comprehensive reforms in the Palestinian Authority. In the context of potential Saudi-Israeli normalization, confidence-building measures between both sides should be implemented, ensuring complete separation in territory, governance, and an autonomous economic framework.

Regardless of such a roadmap, Israel must combat Palestinian terrorism unconditionally, in coordination with regional actors and the reformed Palestinian Authority (PA) security forces. No territory should be annexed outside a comprehensive agreement, as unilateral annexation would deepen Israel's diplomatic isolation and accelerate demographic shifts, ultimately transforming it into a binational state with an Arab majority.

The Domestic Arena

The return of all hostages is essential for Israel's national recovery. Failing to secure their release will deepen the ongoing internal crisis.

To strengthen national cohesion, Israel must:

- Reduce inequality through legislation on security burden-sharing and civil status.

- Preserve balance between all branches of government without exacerbating societal divides.

- Expand the defense budget prudently—based on an agreed-upon national security strategy, rather than short-term responses to the current war.

The improved security situation allows for some calculated risks to allocate more resources to education, infrastructure, health, and the economy. Rebuilding efforts must prioritize the rehabilitation of areas affected by the war, tailored to their unique needs. The western Negev and northern Israel must thrive and consequently strengthen the resilience of Israeli society. Rebuilding these war-torn regions is a national priority, with resources dedicated to their recovery and development, ensuring their prosperity and reinforcing national resilience.

Introduction

This document outlines Israel's national security doctrine and presents INSS policy recommendations for upcoming challenges. The proposed policies are both professional and ethical, balancing realism with a values-based commitment to safeguarding Israel's national identity and security.

The basic underlying assumptions at the core of this document are:

- Israel is a Jewish and democratic state
  - Israel wishes to belong to the liberal-democratic world
  - Israel is the nation-state of the Jewish people

- Israeli society is comprised of citizens from different ethnic groups, religions, and nations, while the majority of its citizens are Jews

- The IDF is a conscription-based army, based originally on mandatory national service

- Israel's regional environment is characterized by instability and violent conflict

- The Israeli economy is based on international relations and trade and depends on them.

This document was prepared amid a prolonged war that underscored the need to reassess and adapt Israel's national security doctrine. The war that began on October 7, 2023, shook the foundations of Israel's national security, exposing a profound failure of the defense establishment in its primary mission—protecting the country's citizens. This reality looms large over the analysis presented here. While the full implications are not yet clear, the war and the failures it exposed provide the most relevant context for revising the national security strategy.

There is an inherent tension between articulating fundamental security principles and responding to an evolving reality. The ongoing war is profoundly reshaping Israeli society, affecting the military's relationship with the public, its role as a "people's army," and public attitudes toward future agreements with regional actors. It is also shifting how Israel's enemies perceive their conflict with the country.

Israel's revised national security doctrine, along with its practical applications, is outlined in three core documents encompassing all aspects of the national security establishment.

- **The National Security Doctrine** outlines the enduring foundations of Israel's security policy.

- **The National Security Policy** translates the doctrine into actionable guidelines, adapting to evolving circumstances and the ideological-political priorities of the elected government. It should be updated periodically in response to diplomatic and security developments.

- These two must be supplemented by implementation documents that provide ongoing directives for institutions responsible for executing government policy, based on thorough and comprehensive staff work. These documents are not included in this paper.

VOLUME 1
THE NATIONAL SECURITY DOCTRINE

The national security doctrine is derived from the State's founding principles, fundamental values, strategic tradition, and national identity. It reflects a framework of guidelines, norms, and values that shaped Israel's establishment and aims to promote the well-being of both the State and its citizens. This value-based foundation informs national security policy and guides policymakers in planning the executive branch's practical actions. These policymakers, in turn, define objectives and develop strategies and guidelines for implementation.

Israeli society is currently engaged in an ideological struggle over its identity and purpose, as it lacks a broad consensus of values on which to base its security doctrine. This is one reason why Israel has no official written national security doctrine and why none of the documents addressing the subject hold binding legal status. However, although not intended as formal guidelines, the Declaration of Independence, together with the national security strategy that has evolved since the State's inception, reveal the doctrine's core components.

National security is built upon four intertwined and widely accepted pillars:

- **National Defense – Military Power** – A robust military, always prepared to defend the State of Israel, even without prior warning, across multiple arenas simultaneously. The army is expected to achieve decisive victory on various fronts—land, air, sea, cyber—while seamlessly integrating with other components of Israel's defense establishment, including the Mossad, the Israel Security Agency (ISA), and the Israel Police.

- **Economic Resilience – Economic Power** – A strong economy that supports security needs without hindering growth, allocates resources to technological innovation, and sustains military and human advantages over time.

- **Societal Resilience – Internal Power** – A unified society built on mutual responsibility, ready and capable of mobilizing in emergencies to defend the state, counter threats, and recover from crises. A model of egalitarianism, which fosters a robust and highly qualified "people's army," drawing the best talent from all social sectors.

- **International Standing and Foreign Relations – Diplomatic Power** – A diplomatic network that ensures Israel's international reputation and influence. This security framework defends against efforts to impose sanctions, preserves backing from global powers—particularly the United States—and provides critical support in

international bodies, as well as acting as a general and military economic resource during both routine and emergency times.

These pillars, along with the national goals derived from them, form a comprehensive doctrine aimed at realizing the shared vision of Israel as a secure and prosperous Jewish and democratic state with a solid Jewish majority and defensible, recognized borders. To achieve this, Israel must integrate military, diplomatic, and economic power to foster a united domestic society, create a conducive regional environment, and secure international partnerships and support.

The National Goals

Jewish identity – The legitimacy of the State of Israel is rooted in the Jewish people's historical connection to the Land of Israel, including their natural right to self-determination in their ancestral homeland. Adding further significance is the ethical dimension of the Jewish tradition, which has been preserved across generations, as well as the values of Judaism that have made substantial contributions to the development of Western culture.

Democratic regime – The existence of the State of Israel is grounded in the promise of freedom, equality, justice, and morality for all its citizens. While the Declaration of Independence does not explicitly mention "democracy," it affirms that Israel will be founded on the principles of freedom and justice, ensuring full equality of social and political rights for all its citizens.

People, Land, and State – The State of Israel's existence is based on the sovereignty and independence in the Land of Israel for the Jewish people who wish to live there (approximately half of the world's Jews). Israel's borders must ensure a solid Jewish majority and an unwavering defense capability. Without a strong Jewish majority, Israel could not remain a Jewish state and would likely lose its democratic character. Thus, the demographics of the country play a decisive role in shaping its borders.

Independence without separation – Israel's survival depends on balancing its natural right to self-determination with the need for relations and integration within the international community and its institutions. Israel's right to exist is based on the principle of national self-determination, and global recognition as an independent and legitimate member of the international community is crucial to its prosperity.

Striving for peace – The pursuit of peace is one of Israel's founding values, deeply embedded in its heritage and essential for long-term security. While Israel maintains the right and duty to defend its borders, even at the cost of war, it also seeks peace agreements and alliances with neighboring countries. As the Declaration of Independence states, extending a hand in peace and goodwill to all neighboring countries—even if it results in peace agreements rather than full reconciliation—is critical. This pursuit of peace should guide policy, while considering the significant divisions within Israeli society regarding the cost of peace and the necessary compromises.

The Pillars of National Security

National Defense – Military Power

Foundations of Strategy

Three foundational layers originally attributed to David Ben-Gurion—deterrence, warning, and decisive victory—have remained axiomatic despite the many changes in Israel's security environment over the years. Although their application is subject to a wide range of interpretation as context changes, they serve as a lasting doctrinal compass for directing Israel's national security. Over the years, in light of accumulated experience, another foundational layer was added: the principle of defense. In this document, we add prevention to the list of foundational layers. The principle of prevention, which was gaining traction before the war as a result of the Campaign between the Wars (CBW) approach, addresses taking initiative to preemptively neutralize emerging threats to Israel.

> **Decisive Victory** – The security doctrine is based on decisive victory, meaning that the enemy is to be left with no option for war, and no desire or ability to participate in a war or other military confrontation. Such victory can be achieved through various methods. Its simplest form is successful confrontation against official national armies. However, it may also relate to organizations that engage in terrorism, guerrilla warfare, or subversion at a lower level than the state. Unlike decisive victory against regular armies, decisive victory against non-state organizations is elusive and more difficult to confirm. Decisive victory against organizations operating as isolated terrorist cells is measured mainly at the micro-tactical level. Without the capability to force the enemy into military and/or governmental collapse and to conclude that the conflict with Israel is not worth continuing, the second foundational principle—deterrence—cannot be achieved.

Deterrence – A deterred enemy is one who avoids action as it sees little chance of attaining its goal through direct military confrontation and fears incurring damage of retaliation. For the State of Israel, deterrence must rely on the enemy's vivid memory of the previous decisive encounter, and not solely on general awareness of Israel's superiority. Deterrence is measurable only when it fails, and its success is difficult to estimate if the enemy does not act or take initiative. The "Iron Wall" concept is the principle of decisive victory put into practical form. The basic premise is that Israel's presence will not be accepted in the region unless its strength convinces Israel's enemies to give up the campaign of challenging the country's very existence.

Warning – A response to an aggressive act that signals the enemy's intention to shift the power balance. In Israel, this would involve deploying military forces to prevent, thwart, or neutralize a surprise attack, while focusing on identifying enemy capabilities.

Defense – Defensive capacity and societal resilience enable the absorption of a blow and the ability to function and recover, even in the event of a surprise. Given that Israel is surrounded by hostile state and non-state actors, the working assumption is that the enemy may act unexpectedly. Therefore, the Israeli military and civilian home front must be able to absorb the blow, recover from it quickly, and proceed toward a decisive victory.

Prevention – As manifested in the course of the "Campaign between the Wars" (CBW), Israel managed to proactively shape reality before events occured. In Israel, prevention relies on cooperation among all security and intelligence organizations in leveraging their extensive international connections to carry out operational and diplomatic efforts. These, in turn, strengthen Israel's international standing. When the principle of prevention is put effectively into practice, opportunities can be better identified and threats more easily thwarted through diplomatic action, which rounds out military/intelligence achievements with a complementary political process affording them permanence.

In Israel, the ultimate success of prevention is narrowing the circle of conflict. With Egypt and Jordan removed from that circle and relations established with Gulf states, Israel's military and political posture has fundamentally changed, and its national security doctrine has acquired a new foundation stone.

Principles of National Defense during Wartime

Shortening Wars – As a relatively small country with a military that relies heavily on reserve forces, which are also crucial to the economy, Israel must strive for short and effective wars. Prolonged, costly, and wasteful wars of attrition work against Israel's operational, economic, and international interests, as well as societal cohesion.

Shifting the War into Enemy Territory – Israel lacks significant geographic depth, and many of its communities are located near the borders. Therefore, it cannot afford incursions into its sovereign territory, even temporarily. In line with the principle that only an assault can achieve decisive victory, the IDF must aim to shorten the defensive phase of wars and quickly transition to counterattacks. This requires building maneuverable ground forces capable of striking deep into enemy territory.

Removing the Home Front Threat – The primary mission of the IDF is to protect the country's citizens and defend the home front. Israel's enemies increasingly bypass traditional battlefields and wage war directly against the home front through tactics like armed unmanned aerial vehicles (UAVs) and massive launches of projectile weapons toward population centers, in addition to using classical terrorism tactics. Therefore, the IDF must minimize damage to civilians and neutralize these threats swiftly. Domestic security forces and the Home Front Command must take control of and manage the civilian front.

Rapid Reserves and Economic Mobilization – Following the initial stage of defense, led by regular army and security forces, a rapid and decisive move into enemy territory should be advanced, based on a large, trained, capable, and readily available reserve force. This depends on public trust in the IDF and its commanders, investment in professional preparation, and greater social equality in bearing the burden of defense.

Simultaneous Defense on All Fronts and Decisive Victory on Each in Turn – The IDF must defend the State of Israel on all fronts at all times. While a defender must always anticipate the possibility of surprise attacks and cross-border incursions, the IDF must not be defeated, even in such cases. This concept must guide IDF force-building and readiness. To shorten wars and ensure a focused effort, the IDF should be prepared to operate on several fronts simultaneously but prioritize achieving decisive victories on one front at a time. It is preferable to concentrate

maximum force on a single enemy than to disperse resources in a low-intensity campaign across multiple fronts.

Subordination of the Military to the Political Echelon and Laws of the State – A fundamental principle in a democratic state is that the military is subordinate to elected civilian leadership. The IDF is under the authority of the Israeli Minister of Defense and is overseen by the Knesset, which supervises defense and intelligence agencies. Subordination to the executive branch is guided by the government (led by the Prime Minister and Minister of Defense) and by the National Security Council and the Ministry of Defense. Military actions are governed by the rule of law, which takes precedence over political directives. In the event of conflict between the two, the IDF will act in accordance with Israeli law.

Internal Legitimacy of the "People's Army" – The IDF is committed to maintaining public trust, especially given the heavy security burden borne by Israeli society. This trust hinges on keeping politics and partisanship out of military discourse, the professionalism of IDF commanders and soldiers, and their ability to protect the country and ensure victory on the battlefield. Adherence to the IDF's ethical code and the values of the State of Israel is essential. Any erosion of these principles could undermine public trust in the IDF, harming its resilience.

Economic Resilience – Economic Power

Economic Fundamentals

Prior to the founding of the State of Israel, the Jewish community recognized that the success and survival of the state would depend on the prosperity of its future citizens. To this end, various methods were employed to build economic capabilities. This principle remains true today: Without a healthy, flourishing economy, Israel cannot provide its citizens with security and dignity or preserve the human capital and institutional strength that have enabled its regional power and standing. The foundational layers of Israel's economic resilience are:

People – Israel is relatively poor in natural resources, but its human capital is exceptional. The growth, preservation, and cultivation of this resource require an educational system and economy that integrate citizens from all sectors and backgrounds.

Institutions – Strong, effective institutions based on good governance and the rule of law are crucial for fostering economic cooperation, building trust, and attracting external investment.

Freedom – Israel's economy, political strength, and security are deeply intertwined with the spirit of innovation that characterizes its people. This spirit combines the values of a free society and a free economy, which actively engages with international markets.

Justice – Concern for the weak and vulnerable, respect for human dignity, and public welfare institutions have been integral to Jewish communities for generations. The State of Israel guarantees a free marketplace for all citizens, irrespective of religion, race, or gender, while ensuring the conditions necessary for living with dignity and achieving self-fulfillment.

Principles of Economic Power

Human Capital – Israel's competitive advantage in international markets lies in its high-quality human capital, which drives the economy and creates wealth. The

high-tech industry stands out in this regard, employing about 15% of the workforce, generating half of Israel's economic growth, and accounting for more than half of its exports. The majority of foreign investment in Israel is directed toward this sector, which serves as the engine of the economy. While the high-tech industry is crucial in times of peace, it becomes even more critical during times of war, as technological advancements help Israel alleviate security challenges.

However, the mobility of this sector is a key vulnerability. Unlike countries rich in natural resources or traditional industries, Israel's primary economic asset—its human capital—is mobile and in demand globally. To maintain its qualitative military edge, Israel must preserve its tech ecosystem, cultivate talent in high-tech-related fields, and continue investing in research and development. Addressing the brain drain is crucial, and mitigating it must be a top priority for the government.

Sharing the Burden – Israel is a small, developed country that has made significant strides in closing the GDP per capita gap with other developed nations. These achievements are largely driven by specific sectors that carry the economic burden in the labor market. However, given current demographic trends, this imbalance is not economically sustainable. Ultra-Orthodox and Arab communities, which together account for more than a third of the country's population, have relatively low labor force participation. For instance, less than 10% of those employed in high-tech come from these sectors. Additionally, the economic sectors they dominate tend to require lesser skills.

This underrepresentation in the labor market points to a deeper issue that originates in elementary education. Many students in the ultra-Orthodox sector are not taught core curricula, creating gaps in education and knowledge that hinder integration into military service, the labor market, and higher-paying positions. If these trends continue, Israel may face lower per capita growth, a diminished quality of life, and a heavier tax burden on the working population.

"An Island Economy" – Israel's economy relies heavily on imports for most consumption while primarily exporting services and high-tech products. It is crucial to prevent the risk of anti-Israeli boycotts while actively pursuing new markets. Achieving diversified trade relations with numerous countries is strategically critical, as it can help reduce the cost of living and strengthen Israel's economic resilience.

Defense Budget – In times of multiple security threats, the simpler political inclination is to increase defense spending. However, the Israeli government must avoid dramatically expanding the defense budget, which would impose a heavy burden on the working population. A key lesson from the "lost decade" following the Yom Kippur War is that defense spending reaching around 30% of GDP led to significant economic instability and a decline in growth.

Societal Resilience – Internal Power

The resilience of any system is based on its ability to adapt to a disaster or severe disruption. Such events inevitably create functional decline, but a resilient system can maintain minimal continuity during the emergency and either return to its previous state ("bounce back") or improve upon it ("bounce forward").

Principles of Internal Power

Solidarity – The ability of individuals, communities, and society as a whole to cooperate and support each other during difficult times. A strong sense of belonging and well-established social ties are critical in coping with pressure and crises.

Leadership and Institutional Strength – Effective leadership and well-functioning institutions—whether governmental, social, or communal—provide clear direction, solutions to crises, and essential support for the population.

Access to Essential Resources – Resources such as healthcare, education, reliable food and water supplies, and critical infrastructure must be available and accessible. Equitable distribution ensures that broader segments of the population can effectively cope with crises.

Economic Resilience – A stable and diverse economy that can absorb shocks, maintain continuity in economic activity, and ensure the livelihood of the population.

Capacity to Endure Loss and Recover – A society's ability to handle loss—whether of life, resources, or assets—while maintaining emotional, social, and economic stability. This includes psychological support systems (such as mental health services and collective grieving), insurance programs, and an economic infrastructure that supports recovery and rehabilitation.

Together, these components build community and societal resilience, enabling them to cope with crises and continue to thrive over time. Israel's society and governmental system, having been in a prolonged state of crisis since the judicial reform debate began in January 2023, are now facing the additional challenges of the ongoing war.

International Standing and Foreign Relations – Diplomatic Power

The State of Israel, as a Jewish, democratic, and liberal state, was founded on the principles outlined in its Declaration of Independence, which emphasizes its commitment to living in "peace and good neighborliness" with surrounding states and to "cooperate with the agencies and representatives of the United Nations in implementing the [181] resolution of the General Assembly of 29 November 1947" (The Partition Plan and the Establishment of the State of Israel).

Principles of Diplomatic Power

Striving for Peace – Since its founding, amidst a war for survival against neighboring states and local inhabitants, Israel has consistently extended its hand in peace. Thirty years passed before Israel reached a peace agreement with Egypt, leading to Cairo's departure from the circle of conflict.

Israel must always remain open and ready to engage in dialogue with any regional country or entity to establish peaceful relations. This principled stance not only represents moral and diplomatic strength but also directly enhances security by narrowing the spectrum of military and diplomatic threats that Israel faces. Addressing the profound, multifaceted impact of the Israeli-Palestinian conflict on Israel's international standing remains an urgent priority.

Integration of Israel into the "Family of Nations" – From its inception, Israel has sought international recognition. Its foreign policy is based on shared interests, values, and the unique contributions of each partnering nation. Israel's location at the crossroads of continents and cultures is a geostrategic asset, and strengthening ties with neighboring countries and the broader international community bolsters national security. As global trade relations evolve, Israel must deepen diplomatic connections worldwide to address emerging challenges such as climate change, migration, and sensitive supply chains.

The Special Relationship with the United States – The relationship between Israel and the United States, founded on shared norms and Israel's perceived value to the

Western bloc, is Israel's most critical international strategic asset. This bond has proven invaluable, positioning Israel as a key ally for many countries in the global arena. Maintaining and strengthening this relationship requires cultivating bipartisan support within the American political system and among diverse communities, particularly the younger generation and the Jewish community.

Deepening Ties within the Civil Sector and with Non-Governmental Organizations (NGOs) – In recent decades, non-state actors—civil organizations, NGOs, social media platforms, international law bodies, and global corporations—have increasingly shaped the global diplomatic landscape. These entities exert significant influence on international decision-making and the activities of countries. Israel must acknowledge the growing importance of these actors, invest in understanding their roles, and develop effective strategies for engagement.

Belonging to the Bloc of Liberal Democratic Countries – In addition to preserving its close ties with the United States, Israel's strength—both internally and diplomatically—lies in its partnership with the global community of liberal democracies. Israel must therefore prioritize strengthening relations with Western nations, with a particular focus on Europe, due to shared historical connections and a mutual commitment to Israel's security. The geographic proximity of many European states provides a natural foundation for deeper political, economic, and scientific collaboration.

Israel as the Home of the Jewish People – Israel has a moral obligation to support the global Jewish community, regardless of denomination. In recent years, Jewish communities worldwide have faced increasing antisemitism, violence, and condemnation, in part due to the current war in the Middle East. Preserving the cultural and historical heritage of these communities is both a vital value in itself and a means of enhancing Israel's image in the countries where they reside.

Expanding Economic Cooperation – Economic diplomacy serves as a vital tool for fostering cooperation and strengthening Israel's economy. By integrating Israeli innovation and entrepreneurship into international technological and economic systems, Israel can ensure continued engagement with the global economy and bolster its standing in the international community.

VOLUME 2
POLICY GUIDELINES FOR ISRAELI NATIONAL SECURITY, 2025–2026

The Global Order Crisis and Its Implications on the State of Israel

A prerequisite for shaping Israel's national security policy is a broad conceptualization of recent events, including the outbreak and progression of the Swords of Iron war. Just as the Russia–Ukraine war is not confined to the battlefield, the war in the Middle East is not limited to the physical arena. In fact, these two protracted conflicts will likely be viewed as central global confrontations that will shape the course of the first half of the 21st century.

The end of the Cold War and the collapse of the Soviet Union ushered in an era of U.S. hegemony, accompanied by powerful economic and social processes, including the digital revolution, the rise of social networks, globalization, and the expansion of the private sector. Inevitably, this American dominance sparked backlash, as it struggled to support protracted, costly, and inconclusive wars abroad while dealing with internal societal rifts and identity-based conflicts. Gradually, opposing forces began to challenge American dominance, both economically and ethically, in various regions and on the global stage.

Doubt has grown regarding the ability of Western countries to address the most critical issues facing humanity's future: climate change; declining birth rates and rising life expectancy, which challenge the validity of the welfare state model; changes in the labor sector due to accelerated technological developments; and unequal access to the benefits of economic globalization. This has led to weakened confidence in the liberal-democratic model and in the ability of political systems to provide practical solutions for both ordinary and critical times. Calls for deglobalization have emerged in response to deepening inequality between those benefiting from the new era and those harmed by it. This, in turn, has contributed to the rise of populist leaders and movements that advocate for "strong" governments, often at the expense of human and civil rights.

The result has been a multipolar world, characterized by the continuing destabilization of the global order that emerged after the Cold War. This is in stark contrast to the once-prevailing notion of a victorious liberal-democratic front destined for expansion.

The Russia–Ukraine war exemplifies the return of the old model of war on European soil—prolonged, high in casualties, and extremely destructive.

The global "Resistance Front," coined by Iran's Supreme Leader, now includes China, Russia, Iran, North Korea, and global extremists (CRINGE). Despite their deep ideological differences, conflicting interests, and mutual friction, these actors are united in their challenge to the democratic-liberal world. A significant portion of the so-called "non-aligned" developing countries attempt to play both sides. Iran leads the "Axis of Resistance," a coalition fundamentally opposed to Israel's existence and actively striving for its annihilation.

In addition to the challenge posed by rivals—authoritarian, communist, and extreme Islamists—a deep rift is growing within the liberal-democratic world itself. Tension is rising between "conservatives" and "progressives," with strong extremist right- and left-wing forces influencing mainstream political camps.

Wars and the global COVID-19 pandemic have underscored the fragility of global supply chains, further eroding confidence in globalization. Regional conflicts, including those in the Middle East, no longer affect only the countries or populations directly involved. Every large-scale conflict now plays out in a complex arena involving global actors—states and private entities, allies and frenemies—whose interests influence the conflict's course and outcomes. This vulnerability has led to the realization that national security requires independent risk management to address the nation-state's reliance on long, vulnerable supply chains.

Implications for Israel

At the outset of the Swords of Iron war, INSS published a policy paper clarifying that Israel's primary adversary was the so-called "Axis of Resistance." The strategic goal of the campaign, it argued, should be to create a powerful regional counterbalance to the Axis, with the active support of the United States, defeat the Axis, and establish a sustainable regional architecture.

Since the war began, Israel's self-defense has relied heavily on American deterrence and support, including aircraft carriers deployed to the Mediterranean and Persian Gulf, clear warnings from President Biden, and later, the active partnership of the United States and other countries in defending Israel against attacks from Iran and

its proxies. This partnership has included supplying weapons and economic aid on an unprecedented scale, as well as providing a diplomatic umbrella against attacks from international organizations. At the same time, Israel and the United States have had disagreements regarding the progress of the campaign in Gaza, the launch of the Israeli offensive in Lebanon, and humanitarian issues. These differences of opinion have even led to occasional hindrances in the supply of critical American weapons.

To date, no formal progress has been made toward creating a regional coalition that could help secure a long-term ceasefire in Gaza, create a counterweight to the so-called "Axis of Resistance," and address the gradual reduction of U.S. presence in the Middle East—a trend that began under both the Obama and Trump (1.0) administrations. The current war has negatively impacted public opinion toward Israel among moderate Arab states, hindering progress on normalization with Israel, especially as Israel distances itself from any progress toward an agreed-upon settlement with the Palestinians.

While Israel's standing as a liberal-democratic state has been eroded in Western countries and international organizations, its image as an international military and technological powerhouse has experienced some restoration as the war continued.

Economically, Israel has faced a downgrade in its credit rating by all major ranking agencies, accompanied by negative projections for the future. However, a transformation occurred in late 2024, marked by a strong recovery in Israeli capital markets after sharp declines earlier in the year. While investment in Israel remains robust, strategic and political uncertainties still overshadow the economy. Israeli households are expected to feel the economic effects of the war well into 2025 and beyond.

Domestically, the social rifts that were starkly evident in 2023, prior to the outbreak of the war, have resurfaced. These tensions threaten the country's societal and economic resilience, as well as the capabilities of its military, which relies heavily on reservists.

These challenges take on particular significance given that Israel's borders are not internationally agreed upon and recognized, and the fundamental values that align Israel with the liberal-democratic bloc are increasingly contested from within. These internal disagreements are manifested in attempts to limit judicial and parliamentary oversight, weaken agencies designed to protect democracy, and attacks on institutions—such as branches of the security establishment—that enjoy greater public trust than the political system. Furthermore, the war's initial objectives, as set by the cabinet, demand a long and complex campaign, which challenges the principle of shortening the war.

The longer the war continues, the greater the strain on Israel's resources—human (personnel, reservists, and their families), material (ammunition, spare parts, and weapons), and economic—and on societal cohesion. Additionally, the prolonged campaign risks undermining both international and domestic perceptions of Israel's legitimacy and its actions. With limited resources, a protracted conflict reduces Israel's ability to convert military achievements into an improved long-term strategic standing.

The solution to a long war lies in Israel's relationship with the United States, which provides the necessary resources and international support. Israel must therefore maintain its standing on both the "conservative" and "progressive" sides of the U.S. political spectrum, as well as among other liberal-democratic countries. While the radical left is deeply hostile to Israel, it is essential to minimize its influence on politics and public opinion. The far right, though aligned with Israel in its opposition to militant Islam, often harbors antisemitic views and tends to sympathize with President Putin.

Israel is engaged in a prolonged struggle against a determined adversary that fundamentally opposes Western values. Defeating this enemy and creating a sustainable regional architecture to serve Israel's national security interests will require a comprehensive, lengthy, and multidimensional effort that is rooted in a clear understanding of Israel's values and sources of power.

The conflict in the Middle East and the struggle to defeat the so-called "Axis of Resistance" are deeply interconnected with global developments and the broader struggle for global hegemony. Israel must firmly align itself with the liberal-democratic camp, which traditionally aspires to a world governed by norms, rules, and agreements.

Securing Military Achievements by Diplomatic Initiative

Throughout the war, Israel's strategic environment has undergone dramatic shifts, beginning with the Hamas surprise attack on the western Negev on October 7, 2023. This murderous attack sparked a prolonged confrontation between Israel and the regional so-called "Axis of Resistance," culminating in a direct clash between Iran and Israel.

By the second half of 2024, the cumulative impact of IDF and other security forces' actions had generated significant, though unstable, achievements. The most notable of these was a systemic blow to the so-called "Axis of Resistance." In the Gaza Strip, Hamas's military capability was operationally defeated, although elements remaining in the field continue to engage in guerrilla activity against IDF forces and terrorize the civilian population. Their actions serve as a reminder that a decisive military victory remains temporary unless accompanied by a complementary political process. Hamas is attempting to rehabilitate itself and has had some success in doing so.

Hezbollah, meanwhile, suffered a severe blow: its leader and most of its military leadership were eliminated, its firepower significantly eroded, and its influence within Lebanon greatly reduced. However, the organization remains a military threat and continues to strive for recovery.

The Assad regime in Syria was overthrown within days, a dramatic event that severed the main ground supply route from Iran to Lebanon, hindering Hezbollah's ability to rebuild its military presence. It remains uncertain whether the new regime in Damascus will lean toward radical Islam or establish a more pragmatic and moderate government.

Iran has yet to respond to the extensive Israeli attack on its territory in October 2024 and is further threatened by the implications of Donald Trump's election as President of the United States. While it would be premature to declare the extent of Iran's deterrence, its strategic vision is unlikely to change significantly. As such, Iran will likely focus on rebuilding its domestic power and regional influence.

Amid the IDF's operational achievements, some are tempted to believe that the only solution lies in further use of force—endless military action, annexation of Judea and

Samaria, the Gaza Strip, and even territorial expansion in other areas. This reaction stems from the shock and outrage of October 7, compounded by a sense of restored military power. However, history teaches us that a combination of military force and complementary political efforts is required for lasting security. Relying solely on military force, without political stabilization, will quickly lead to the erosion of military achievements and the emergence of new threats, both expected and unforeseen.

Therefore, these favorable developments, including the renewed perception of Israel's power regionally and globally, present a tangible opportunity to enhance Israel's security. This moment, between Israel's impressive military successes and the ability of its enemies to renew their threats, demands diplomatic action to solidify military gains into a sustainable diplomatic and security reality. At the same time, efforts must be made to alleviate social, ideological, and political tensions, which have been exacerbated by the war.

Israel's Dynamic Strategic Environment

More than a year into the current multi-front war, Israel has expanded its strategic flexibility and currently has room for maneuver, especially in the near term. Before addressing Israel's national security challenges, it is essential to analyze the shifts in its broader strategic landscape.

The Undermining of Iran's Security Doctrine

Iran's military capabilities have proven ineffective in deterring a direct Israeli attack, and even its nuclear threshold status has not provided sufficient deterrence. The proxy strategy has failed to constrain Israel's actions, and its network of militias has collapsed. The downfall of the Assad regime has further weakened the so-called "Axis of Resistance," severing Syria's role in the Iranian regional strategy. In this new reality, Iran will also struggle to restore Hezbollah's former threat level against Israel.

▪ **Opportunity** – Iran is at an unprecedented point of vulnerability, giving Israel greater freedom of action than ever before. This moment could be leveraged to push for a stronger nuclear agreement, curb Iranian regional influence, and even consider military efforts to halt Iran's nuclear program.

▪ **Risk** – If Iran concludes that its nuclear threshold status is insufficient for deterrence, it may accelerate efforts to develop nuclear weapons, reshaping the regional balance of power in its favor.

Shifting Power Dynamics in the Palestinian Arena

While Hamas's continued hold over Gaza may strengthen its political standing over time, its military capabilities have been significantly degraded. However, this decline has not automatically bolstered more moderate Palestinian factions, such as Fatah. Still, the shifting balance of power could indirectly improve their relative standing.

▪ **Opportunity** – The relative strengthening of pragmatic Palestinian elements creates an opening for Israel to explore more flexible political moves with reduced risk.

- **Risk** – The Palestinian political landscape remains highly volatile, and Israeli public trust in diplomatic processes is at an all-time low. The trauma of October 7 and past disappointments make restarting negotiations nearly impossible. Instability could empower radical factions, potentially leading to the collapse of the Palestinian Authority, economic breakdown in Judea and Samaria, and an influx of weapons funded by Iran and its proxies.

The Gaza Strip as a Disaster Zone

- **Opportunity** – Israel holds the key to Gaza's reconstruction. This leverage can be used to secure strategic gains, such as the return of all hostages, the establishment of a post-Hamas governing authority, a ceasefire, and the strip's demilitarization.

- **Risk** – The "Somalization" of Gaza: escalating hostilities among armed factions, deepening humanitarian crises, and the emergence of criminal and militant groups seeking to exploit the chaos for their own resurgence. Even if Israel refrains from imposing direct military rule, it will still be held responsible for Gaza's stability and security.

Judea and Samaria: A Tense Standoff

Judea and Samaria are caught in a leadership vacuum, with a weak Palestinian Authority, an increasingly disillusioned and volatile youth population, and an economy heavily dependent on Israel. Meanwhile, calls for annexation and settlement expansion in Israel are growing louder. Despite Hamas's military defeat, the conditions for a large-scale uprising or sustained grassroots terror campaign have not materialized—yet. Concurrently, Israel continues to exercise its operational flexibility and freedom of action, including the large-scale deployment of military force in northern Samaria to curb security threats.

- **Opportunity** – The absence of a viable two-state solution creates room for Israel to explore alternative strategic approaches and new paradigms.

- **Risk** – The disintegration of Palestinian governance structures could lead to a new wave of violent escalation—an Intifada 3.0. If terrorism surges and Palestinian institutions collapse, Israel may be forced into direct governance of the territory, creating a de facto one-state reality that contradicts fundamental national security principles.

The Evolving Regional Balance of Power

- **Opportunity** – Iran's regional influence can be further constrained, while normalization prospects with Arab states may improve. Potential diplomatic initiatives include stabilizing Israel's northern border by capitalizing on Hezbollah's weakness, forging a non-aggression pact with Syria's new government (which could also ease tensions with Turkey), and finalizing a normalization deal with Saudi Arabia. A well-coordinated diplomatic initiative with the United States could make these developments achievable.

- **Risk** – The collapse of the Assad regime could have unintended consequences, potentially destabilizing Israel's peace treaties with Jordan and Egypt. A radical Sunni axis, driven by the rise of the Muslim Brotherhood across Syria and beyond, could emerge as a new, potent threat—potentially just as dangerous as the former Iranian-led "ring of fire."

Global Power Shifts in the Trump (2.0) Era

Donald Trump's return to the White House marks a new phase in international relations, with significant implications for the global balance of power. U.S.–China rivalry and potential U.S.–Russia rapprochement are expected to determine the global balance of power in the foreseeable future. President Trump has already signaled plans to intensify trade wars, end the Russia-Ukraine conflict, weaken Iran, and stabilize the Middle East. Israel's ongoing multi-front war, however, runs counter to core American interests and is further straining its relations with Europe.

- **Opportunity** – Trump's forceful demeanor may provide regional stability, creating an opportunity to push forward agreements—such as ending the Gaza war, securing the return of all hostages, and advancing Saudi-Israeli normalization in exchange for a diplomatic initiative regarding the Palestinian issue.

- **Risk** – The resurgence of antisemitic elements in the United States, potential economic isolation due to Israel's ties with China, and the prospect of an American withdrawal from the Middle East. If Washington decides to reduce its involvement, Israel could be left to navigate an increasingly volatile Middle East on its own, facing severe security, economic, legal, and diplomatic risks.

Challenges of National Security – Threats and Countermeasures

Iran and the so-called "Axis of Resistance"

Despite the erosion of Iranian proxies' capabilities and setbacks to its national security doctrine, Iran and the global so-called "Axis of Resistance" remain the primary external threat to Israel. Iran provides financial and military support to actors operating against Israel, sustains a vision of Israel's destruction, influences the Palestinian arena (including within Israel in the form of influence operations and agent recruitment), and is considering whether it should cross the threshold and fully develop a nuclear military capability. Addressing this comprehensive challenge requires countering three core threats: Iran's nuclear program, proxies and satellite states, and the direct military threat to Israel.

The Iranian Nuclear Threat

Iranian leaders publicly maintain that their nuclear program is for civilian purposes, as emphasized by the religious ruling prohibiting the production and use of nuclear weapons. However, recent rhetoric from within Tehran indicates growing dissatisfaction with mere "nuclear threshold" status and an emerging debate over the pursuit of nuclear weapons as a deterrent. This shift suggests increased preoccupation with the issue and possibly a move toward nuclear armament under favorable conditions.

At the same time, the regime is signaling a willingness to ease political and economic sanctions through negotiations. Nevertheless, before the U.S. administration truly clarifies its approach to Iran, Tehran appears determined to preserve its nuclear advancements while possibly agreeing not to weaponize and to allow increased oversight by the International Atomic Energy Agency.

Israel must prepare for three possible scenarios:

A nuclear agreement whose details remain uncertain, particularly whether it includes a significant rollback of Iran's nuclear capabilities.

No agreement, with continued Iranian nuclear progress short of breakout—raising concerns about U.S. acceptance of Iran's nuclear threshold status without a credible military deterrent.

A nuclear **breakout**.

Countermeasures to the Nuclear Threat

In the event of an agreement:

Israel should seek involvement in shaping any potential nuclear deal. The goal must be to ensure that negotiations include immediate freezing of Iran's nuclear progress and address all elements of the nuclear threat:

Fissile Material: Limits on uranium enrichment levels and stockpile quantities; dismantling advanced centrifuges that were installed post-2018; and strict, intrusive inspections.

Delivery Systems: Restrictions on ballistic missile ranges and advanced technologies; caps on missile stockpiles; and enforcement of non-proliferation measures.

Weaponization: Oversight of nuclear research institutions and prohibitions on activities involving nuclear core materials.

If no agreement is reached:

Israel must ensure strict enforcement of sanctions while maintaining close intelligence and diplomatic coordination with the United States Defining 90% uranium enrichment as a red line—warranting military action—should be a priority, with or without U.S. support. As Iran seeks to outlast the Trump presidency, hoping for a policy shift under the next administration (mostly "maximum pressure"), this period must be used to undermine the regime through covert operations while avoiding overt foreign attribution.

If Iran initiates a nuclear breakout:

This scenario entails Iran withdrawing from the NPT, enriching uranium to 90%, and conducting weapons tests. In response, its nuclear sites must be swiftly destroyed. The United States should be urged to deliver a firm ultimatum to Tehran, deterring further nuclear advancements before military action is taken. To prevent a regional arms race and the threat of nuclear terrorism, Israel must act decisively. While coordination with the United States is essential, independent military capabilities must be fully developed to ensure the mission's success.

The Threat of Proxies and Satellite States

Israel's primary challenge is to prevent—or at least delay—Iran's efforts to rebuild its network of proxy forces following the multi-front war, while Tehran simultaneously explores alternatives to its current national security doctrine.

Iraq and Yemen

Iraq serves as a critical security buffer for Iran, a distant base of fire against Israel, and a central pillar of Shiite influence in the region. Maintaining a U.S. presence in Iraq is in Israel's best interest, as it restrains the Iraqi government and limits Iran's influence.

Iran's relationship with the Houthis in Yemen is strategically tied to their control over the Bab al-Mandab Strait and their ability to project power against Israel from a geographically remote location. The Houthi threat to Israel is directly linked to the war in Gaza, and missile attacks from Yemen will likely persist as long as the fighting continues.

Unlike other Iranian proxies, the Houthis are highly independent and difficult to deter, limiting Tehran's ability to control them. Israel must therefore coordinate with Gulf states, which also face the Houthi threat, in developing a regional and international response. At the same time, direct Israeli involvement in countering the Houthis must increase as a demonstration of strength and deterrence. As an "island state" dependent on open supply chains, Israel cannot tolerate disruptions to maritime trade. This principle, established before the Six-Day War in response to the blockade of the Strait of Tiran, remains vital today.

Hezbollah and Lebanon

Security Considerations

Israel must exploit Hezbollah's current weakness to degrade its capabilities while restoring security for northern communities. This must align with the ceasefire agreement, as Hezbollah—backed by Iran—will likely work to rebuild its military and civilian networks in southern Lebanon. While Hezbollah aims to avoid direct conflict with the IDF during its recovery, the organization's efforts could still spark renewed clashes with Israel.

Given its current advantage, Israel should seize this opportunity to establish a new security framework along the Lebanese front, specifically an enhanced border security regime:

- **Redefining Rules of Engagement:** Maintaining operational freedom against Hezbollah violations while working with international monitoring bodies as stipulated in the ceasefire agreement. If monitoring efforts fail, Israel must act unilaterally to safeguard its interests and enforce security.

- **Strict Arms Embargo**: Preventing Hezbollah's rearmament by tightening surveillance and interdiction of weapons shipments via land, sea, and air. If international enforcement is inadequate, Israel must take independent action to disrupt Hezbollah's military buildup.

- **Enhancing Military and Civilian Defense**: Expanding the IDF presence along the border, reinforcing civilian emergency squads, and improving fortifications in northern communities.

- **Lebanese Army Engagement:** Any buildup of the Lebanese Armed Forces (LAF) must be coordinated with Israel to ensure it does not pose future threats, with a particular focus on preventing the transfer of weapons to hostile elements.

Political Considerations

While Israel's long-term vision is a peace agreement with Lebanon, direct efforts toward this goal are currently limited. Israel should leverage U.S. and allied influence to support a broader strategy that includes:

- **Post-War Reconstruction Support:** Encouraging Western and Gulf-state investment in Lebanon to counterbalance Iranian assistance.

- **Political Reform Advocacy:** Promoting changes that reduce Hezbollah's political dominance, particularly given the January 2025 election of a new Lebanese president and prime minister who are not aligned with Hezbollah.

- **Diplomatic Engagement:** Exploring opportunities to improve Israeli-Lebanese relations, particularly in resolving border disputes and leveraging Lebanon's interest in regional stability.

The Threat of Instability in Syria

Following the fall of the Assad regime, Syria's future remains uncertain, with prolonged instability likely. It is unclear whether the country will fragment into separate political entities and foreign spheres of influence or whether a central government will emerge with the ability to impose order. The transitional government led by Hay'at Tahrir al-Sham is taking rapid steps to stabilize Syria—appointing ministers, setting a constitutional process, and unifying military factions into a national Syrian army. However, significant challenges remain, including ongoing clashes between ethnic groups.

For Israel, this new reality offers a strategic advantage by severing Syria's connection to the so-called "Axis of Resistance," reducing its role as a logistical hub for arms transfers. Nonetheless, chronic instability poses security threats that Israel must address, particularly the entrenchment of radical Islamist elements near its border and the transfer of advanced weaponry to hostile actors.

Three Possible Scenarios for Syria:

Stabilization & Moderation – A central government takes root, fostering reconciliation and international relations, including potential diplomatic ties with the West.

Islamic Radicalization – Syria aligns with the political Islamist camp (e.g., the Muslim Brotherhood, Turkey, and Qatar), declares resistance to Israel and the West, destabilizes Jordan by empowering the Palestinian Muslim Brotherhood in the Hashemite Kingdom as well as in Egypt, and fosters Hamas-like organizations in the Syrian Golan.

Fragmented Confederation – Syria divides into four semi-autonomous regions (Kurdish, Sunni, Alawite, and Druze/Khourani) that interact with a weak central government while maintaining a fragile balance of deterrence punctuated by sporadic violence.

Countermeasures:

Given the risks, Israel must prioritize preventing the Islamic radicalization scenario while working to facilitate the other two, which are preferable to Syria rejoining the so-called "Axis of Resistance."

- Preventing threats near Israel's border – Israel must eliminate any emerging threats from Iranian proxies or radical Sunni factions. This includes maintaining control over the buffer zone, conducting military strikes as needed, and preventing Iranian resurgence or spillover instability into Jordan.

- Engaging key groups – Israel should strengthen ties with positive local stakeholders (Druze, Kurds, and moderate Sunnis) while avoiding direct military entanglement. Coordination with allies—primarily the United States—is crucial, alongside careful diplomacy to prevent conflicts with Turkey.

- Exploring future dialogue – If the United States and Western nations recognize a future Syrian government that does not collaborate with terrorist groups that pose threats to its national security, Israel should consider direct engagement. This could lead to security agreements that mitigate threats while preserving Israeli sovereignty over the Golan Heights and establishing an effective security buffer.

- Regional coordination – To shape Syria's trajectory and counter Iranian or Russian influence, Israel must prioritize engagement with regional stakeholders, particularly Jordan, Turkey, and the Gulf states.

The Emerging Potential Threat from Turkey

Turkey's deep ties with Syria's current ruling actors make it the most influential external player in the country. Alongside Qatar, it aligns ideologically with political Islam, particularly the Muslim Brotherhood. Turkey's increasing radicalization and President Erdoğan's promotion of a neo-Ottoman vision present a growing challenge for Israel that warrants close monitoring and strategic preparation.

Countermeasures

- Closely track Turkey's expanding presence in Syria, particularly its relationship with Hamas and its potential foothold in the country as a direct exploitation of instability.

- Regard Turkey as a potential reference threat that requires monitoring and basic readiness, but not as part of the reference threat for full-scale military buildup.

- Explore diplomatic avenues to ease tensions, emphasizing shared interests in ensuring Syria does not become a regional security threat or a base for terrorist organizations.

- Avoid overt support for groups and organizations Turkey perceives as hostile—such as the Kurdish underground and its Syrian branch—since doing so could prompt Ankara to support anti-Israel elements along the Golan Heights.

The Palestinian Complex and Israel's Regional Arena

The surprise attack on October 7, 2023, marked a turning point in Israeli history and its relations with the Palestinian population. The indiscriminate, murderous nature of Hamas's assault on the western Negev is widely seen in Israel as confirmation that there is no foundation for discussing any potential arrangement, let alone a resolution to the conflict or a future peace agreement. The subsequent military campaign, the convergence of arenas calling for Israel's destruction, and the expressions of support for Hamas's actions from residents of Judea and Samaria, along with the Palestinian Authority chairman's failure to unequivocally condemn the massacre, have shaped the Israeli public perception that the conflict with the Palestinians is unresolvable.

Israel is undeniably under threat from countries and organizations that refuse to recognize its right to exist and seek its destruction, including Palestinians. However, the continuation of the conflict provides legitimacy for Palestinians, other states, and international bodies to wage a multifaceted political-diplomatic, legal, and economic campaign against Israel's policies. This campaign threatens to constrain Israel's freedom of action and diminish global attention to its security needs.

Moreover, Israel's unilateral policies on the Palestinian front may jeopardize long-standing peace agreements, including the Abraham Accords, especially if full or partial Israeli sovereignty is declared in Judea and Samaria, a military administration is imposed in the Gaza Strip, and Palestinians are encouraged to emigrate from the area outside a comprehensive agreement. In the meantime, the threat to Jordan's stability will intensify, and the prospects for normalizing relations between Israel and Saudi Arabia will decrease. Above all, such policies would undermine Israel's national security doctrine by contradicting its identity as a Jewish and democratic state.

The Threat of Palestinian Terrorism

The Swords of Iron War weakened Hamas and other Palestinian terrorist organizations in Gaza and Judea and Samaria, but the broader resistance to Israel remains intact. Hamas, Islamic Jihad, and other factions will continue to oppose Israel's existence and work to strengthen their positions, aiming to harm Israel and Israelis. Among Palestinians, there is a mixed response: while many youth are inspired by Hamas's violent actions, others are aware of the high cost of such terrorism. The Palestinian Authority (PA) is combating Hamas and other terrorist factions but struggles with

credibility. Despite its efforts, the PA's ongoing support for the families of terrorists, its incitement against Israel, and its international diplomatic and legal campaigns have led many Israelis to view it as complicit in terrorism. Internally, the PA faces rampant corruption and lacks the authority to decisively defeat these groups. Meanwhile, the Israeli government continues to reject any possibility of the PA replacing Hamas's rule over Gaza.

Countermeasures

- The fight against Hamas and Islamic Jihad must continue beyond the current campaign, both in Gaza and elsewhere. Israel must retain operational freedom to combat terrorist threats and infrastructures within Gaza, similarly to Area B in Judea and Samaria.

- Hamas's attempts to regroup should be blocked through strict control of borders, preventing the flow of weapons and funds from Iran and Qatar.

- Coordination with the PA's security services in Judea and Samaria should remain in place.

- Hamas must be excluded from the Palestinian political system and barred from PA leadership.

The Threat of a "Binational State"

Unilaterally annexing parts of Judea, Samaria, and Gaza and causing the collapse of the Palestinian Authority could lead to a binational state between the Jordan River and the Mediterranean Sea. The growing awareness of Israel's potential disaster, combined with frustration and despair over the lack of a political solution in the Palestinian arena—stemming in part from the memory of failed past initiatives—seems to be driving the creation of this reality. Meanwhile, policies promoting the application of Israeli law and sovereignty in Judea and Samaria continue, but their consequences pose a direct threat to Israel's character as a Jewish and democratic state, one that is safe, prosperous, and enjoys international legitimacy, particularly for its military and defensive actions. As annexation efforts intensify, Israel risks facing even greater condemnation and isolation on the global stage.

At the same time, a major obstacle to an agreement between Israel and the Palestinians remains the Palestinian insistence on the "right of return" and the expectation that the

PA will never agree to the demilitarization of territories under its control in any future agreement. Additionally, the vast asymmetry in population and resources between Israel and the Arab world continues to fuel Palestinian hopes that Israel will eventually be defeated, much like the Crusaders were expelled from the region.

The likelihood of reaching a peace agreement or a permanent settlement within the "two-state" paradigm in the near future is extremely slim, and public support is the lowest it has ever been. Nevertheless, current trends of Jewish settlement deep within Palestinian territories will only make separation more difficult, pushing Israel toward a one-state reality with all its implications.

Countermeasures

- Israel must adopt a strategic doctrine based on two central pillars:

  - **Hedging** – To protect Israel's Jewish and democratic character, the country must leverage its military, political, and economic power to take practical steps to separate itself from the Palestinians—demographically, politically, and territorially. The specific approach to separation and division requires dedicated research, creative thinking, and the establishment of a new paradigm, especially after the failure of previous models. The options will be re-examined in the current context, including possibilities such as a Jordanian-Palestinian confederation, Palestinian autonomy within Israel or in Jordanian territory, a permanent settlement based on the two-state vision, or President Trump's Peace Plan (the "Deal of the Century") as well as his recent initiative to encourage emigration of Gazan residents.

    A comprehensive policy analysis outlining the separation framework will be published in 2025 by the Institute for National Security Studies.

  - **Strategic Positioning** – Israel must capitalize on the successes of the war, reinforce its existing peace agreements, pursue normalization with Saudi Arabia, and establish a regional coalition based on mutual defense interests and economic prosperity.

- In exchange for Israel's participation in a regional coalition with moderate Arab states and the introduction of a comprehensive reform of the Palestinian Authority (referred to as RPA—the "reformed Palestinian Authority"), Israel should limit

settlement construction, refrain from unilateral annexation outside an agreement, and expand Palestinian autonomous authority in Judea and Samaria.

RPA Requirements

- Implementing significant functional reforms to facilitate the expansion of the PA's autonomous authority.

- Upholding its commitment to prevent terrorism and dismantle terrorist infrastructures.

- Halting subsidies to the families of terrorists and prisoners.

- Introducing de-radicalization educational programs, curbing incitement against Israel, and promoting the recognition of the impracticality of realizing the "right of return."

- A commitment from the PA that Hamas will not be integrated into the government, along with recognition of the two-state principle, where Israel is the nation-state of the Jewish people.

Halting Actions That Accelerate a One-State Reality

- No unilateral annexation or application of Israeli law in Judea and Samaria, as it would offer no security advantage beyond the current situation. Israel already controls the Jordan Valley, maintains operational freedom throughout the area, and effectively cooperates with Palestinian security forces, as well as with Egypt, Jordan, and Arab countries under U.S. Central Command (CENTCOM).

- No new settlements will be established, and the retroactive legalization of illegal outposts will be halted. Illegal outposts will be evacuated, considering both security and legal factors. Construction will be limited to existing settlements, within their designated boundaries, without expanding into Palestinian population centers.

- No settlers will be evacuated except as mandated by Israeli law or as part of a political settlement.

- To advance the renewed plan for separation from the Palestinians, the Israeli government should soften its opposition—at least on a declarative level. At the

same time, efforts must focus on preventing violence on the Temple Mount, preserving the status quo, and taking decisive action against Jewish terrorism.

The Threat of a Prolonged War in Gaza and the Risk of Hamas's Revival

The Israeli government's reluctance to outline a clear "day after" strategy for Gaza is prolonging the war and risks entrenching Hamas's hold on the Strip. Israel faces the challenge of stabilizing Gaza while preventing Hamas and other terrorist factions from regrouping and strengthening. Simultaneously, it must prepare for the consequences of failing to implement a viable post-war plan. Three likely scenarios could emerge:

- **Chaos** – Even with a hostage deal and an end to the war, Gaza could descend into disorder.

- **Military Administration** – Israel may be forced to maintain control over parts or all of the Strip.

- **Partial Annexation** – Some areas of Gaza could be absorbed into Israeli territory.

Countermeasures

Hostage Release – Securing the return of all hostages is a priority, despite the short-term cost of keeping Hamas a relevant actor and releasing terrorists with blood on their hands. Nevertheless, Israel must persist in dismantling Hamas's military and governing capabilities.

Eliminating Hamas Rule & Stabilizing Gaza – A Palestinian civil administration aligned with the PA, without Hamas representation—even in a technocratic form— should be established to manage governance and restore order. This approach is preferable to Israeli control or a descent into chaos and "Somalization," which would ultimately reinforce Hamas's influence. Once the PA enacts necessary reforms, it could assume full control with backing from key Arab states, including Egypt, Saudi Arabia, the UAE, and Jordan, under U.S. oversight.

Security – A regional and international consensus on the demilitarization of Gaza is essential. The IDF must retain operational freedom to enforce this principle and prevent terrorism, even after the formation of restructured Palestinian security

forces committed to curbing Hamas's resurgence. Security coordination should follow the model used in Judea and Samaria.

Humanitarian Efforts – An international humanitarian council, including the United States, Egypt, the Gulf states, and the international community, should be established to oversee aid distribution. A secure mechanism must be put in place to guarantee that aid convoys reach their destinations, with support from international civil society organizations.

Reconstruction – Rebuilding Gaza should proceed only under the condition that Hamas is excluded from governance and the reconstruction process. This effort must include dismantling refugee camps, constructing new cities, and developing national and economic infrastructure, with a strong focus on employment opportunities.

Arab Involvement – Active participation from Egypt, Saudi Arabia, the UAE, and Jordan is a strategic Israeli interest in stabilizing Gaza. Even if Arab states insist on PA involvement in reconstruction, their role remains vital in ensuring long-term stability and governance.

Challenges to Saudi-Israeli Normalization and Regional Integration

Normalization between Israel and Saudi Arabia has been a key foreign policy objective for Israel and both the Biden and Trump administrations. However, Israel's refusal to advance any political and diplomatic breakthrough on the Palestinian front, along with growing opposition to normalization in moderate Arab states following the Swords of Iron War, has stalled progress. Achieving this goal would strengthen Israel's regional standing and help counter Iranian influence.

Countermeasures

U.S. Leadership – Engaging the Trump administration to advance official Saudi–Israeli ties and foster regional integration, with a focus on security and economic cooperation between moderate Arab states and Israel, led by the United States. Such an initiative would enhance Israel's strategic position, particularly in countering Iran, while maintaining its military edge.

Restoring Israel's Strategic Value – Beyond military successes in the war, Israel must reinforce its role as an asset to moderate Arab states by strengthening peaceful relations and avoiding unilateral annexation in Judea and Samaria or settlement expansion in Gaza.

Expected Benefits of Normalization and Regional Integration

Security Cooperation – Enhancing military coordination within CENTCOM, maintaining a U.S. military presence in the region, and strengthening regional defense against Iran's threats, including ballistic, UAV, and maritime risks. This includes intelligence coordination, early-warning systems, and joint technological initiatives.

Palestinian Arena – Reinforcing the moderate Arab bloc, encouraging Palestinian Authority reforms, and securing regional and international backing for demilitarizing Palestinian territories while ensuring Israeli security control. Arab states would also play a role in stabilizing and rebuilding Gaza, with international investment aimed at reconstruction while preventing resources from falling into terrorist hands. A multilateral political framework—supported by guarantees from moderate Arab states—could help advance an Israeli-Palestinian arrangement.

Economic and Technological Integration – Launching major regional projects, such as an infrastructure corridor linking the Gulf to the Eastern Mediterranean, alongside AI-driven technological cooperation. These initiatives would leverage Israel's and the Gulf states' complementary strengths, including energy resources, skilled labor, and advanced industries.

Regional Coalition for Gaza – A broad regional alliance could help end the war, secure the release of hostages, and establish a technocratic administration in Gaza while preventing Hamas's resurgence. This coalition would expand the Abraham Accords, bolster Palestinian Authority reforms, and facilitate a structured, gradual separation between Israel and the Palestinians as part of a broader regional framework.

Sustaining Superpower Support in a Shifting Global Order

The Erosion of Israel's International Standing

The international backlash against Israel over the fighting in Gaza has amplified baseless accusations of genocide, legitimized by legal proceedings and international warrants. This institutional support for such claims has strained Israel's diplomatic and economic ties. If the trend persists, Israel faces serious risks: economic and security setbacks, growing international isolation, and the erosion of its scientific, economic, and military advantages.

The Risk of Reduced U.S. Engagement

The possibility of a more isolationist American administration raises concerns that the United States may scale back its Middle East involvement, potentially cutting aid to Israel if a regional solution appears unattainable. This could embolden terrorist groups, weaken U.S. deterrence against Iran, and expose Gulf states to new threats.

U.S.–Israel Relations Under President Trump (2.0) – An Opportunity and a Challenge

Opportunity: Strengthening Ties—The Trump administration is expected to bolster U.S.–Israel relations, with key appointees holding pro-Israel positions. This could grant Israel greater operational freedom, enhance deterrence against Iran, and introduce a credible military threat to counter Iranian aggression.

Challenge: Maintaining Bipartisan U.S. Support—Growing criticism within the Democratic Party, particularly amid Israeli judicial changes, threatens long-term bipartisan backing.

Countermeasures

Strengthening Ties with the U.S. and Western Allies

- Reaffirm Israel's strategic value as a democratic ally, aligned with Western norms and rule of law.

- Align with U.S. and European interests by factoring in shared priorities with key allies like Germany, Britain, and France.

- Securing a defense pact with the United States offers more advantages than disadvantages, as it would strengthen long-term strategic ties, enhance Israel's deterrence capabilities, and provide essential security support. This pact is particularly important given the shifting political landscape in the United States, including the weakening of the pro-Israel lobby and the rise of critical or even anti-Israel voices within the political system. As Israel becomes increasingly viewed as a partisan issue, safeguarding bipartisan support—which has been a cornerstone of U.S.-Israel relations—is essential. Ultimately, the benefits of a strengthened defense partnership far outweigh any potential constraints on Israel's operational freedom, ensuring its security and regional stability in the long term.

- A defense pact could also be integrated into a broader regional strategy that promotes stability and counters efforts to weaken or isolate Israel. Additionally, it would strengthen Israel's position to shape the ongoing confrontation with the Iranian nuclear threat.

- Avoid partisan entanglement in U.S. politics to preserve bipartisan support.

- Influence the upcoming U.S. Memorandum of Understanding (MOU) negotiations to secure military aid, maintain Israel's technological and qualitative military edge, and strengthen deterrence against Iran and other actors in the Eastern Mediterranean.

- Engage Europe strategically to reinforce Israel's economic ties and counter Iran's influence, particularly by confronting the Russian-Iranian axis. This may require a firmer Israeli stance toward Russia while maintaining critical diplomatic channels.

- Manage economic ties with China cautiously to balance national security concerns with the American sensitivity regarding Chinese investments in advanced technology.

Rebuilding Israel's Global Standing and Preventing Isolation

- Israel must emphasize the democratic values it shares with the Western world. Weakening core democratic principles—such as the separation of powers and the protection of individual and minority rights—and engaging in public clashes with international law only increases the risk of isolation.

- Israel must reaffirm its commitment to international law, promoting thorough debriefings and investigations—and pursuing prosecution when necessary—when actual violations are truly suspected. Criticism should be addressed in a reasoned, transparent manner, distinguishing between legitimate concerns and attacks rooted in anti-Israel or antisemitic sentiments that undermine Israel's right to exist and defend itself.

- The Foreign Ministry, along with the entities responsible for Israel's public diplomacy globally, must be strengthened. Engaging with non-governmental organizations, which can offer nuanced perspectives that resonate with a broad range of audiences, including Diaspora Jewry—particularly in the United States—should be a priority.

- While the likelihood of success may be uncertain, Israel must pursue political agreements, particularly regarding a resolution to the Palestinian conflict, without compromising its core security needs. It is crucial to avoid appearing as though Israel rejects peace. Even an unsuccessful political initiative is preferable to relying solely on military entrenchment as a long-term solution to Israel's national security challenges.

The Domestic Arena: Security, Societal and Economic Hurdles

The ongoing Swords of Iron War is exerting tremendous pressure on Israel's military, economy, and society. The strain on armed forces and personnel is unprecedented, reflected in rising casualties, growing reluctance to serve over time, and a steady decline in volunteers for long-term military careers. The prolonged fighting demands the sustained commitment of large forces, stalling essential efforts to renew and rehabilitate both the military and broader Israeli society—efforts critical to maintaining national cohesion and resilience.

The economy is also bearing a heavy toll, due to direct war costs, disruptions caused by the absence of reserve unit members, and a growing perception of instability that is undermining Israel's global reputation. Compounding this, political and ideological divisions are deepening, particularly over the government's unilateral judicial reforms. Public attacks on key institutions—such as security agencies—along with contentious policies like the conscription law, seen by many as discriminatory, further fuel these divisions. The unity Israel experienced after October 7th has faded, and issues of loyalty and burden-sharing are increasingly seen as points of division rather than solidarity. Public trust in the country's core institutions—state authorities, the political system, the defense establishment, the judiciary, and the media—is rapidly eroding.

Threats

- **Loss of domestic legitimacy**: A prolonged war of attrition without a clear political objective could significantly erode domestic support, particularly for military service, and may lead to a crisis in recruitment for officer training and career military service.

- **Reserve system strain**: The continuing burden on reserve personnel is expected to cause severe damage to the reserve forces over time, potentially leading to a decline in overall military competence in the coming years.

- **Military ethos erosion**: Without a structured process of rehabilitation, recuperation, and renewal of military supplies, alongside transparent debriefings and the establishment of a state commission of inquiry, a prolonged war of attrition and intensive ongoing security operations could erode the military ethos. This includes

a breakdown in discipline, potentially leading to a loss of trust in commanders, undermining the chain of command through disobedience (or failure to issue orders for fear they will not be followed), and an increase in actions contrary to the IDF code of ethics and international law.

- **Hindered force development**: A prolonged war could slow the defense establishment's learning processes and limit the implementation of vital lessons learned.

- **Political and military overlap**: As the line between political interests and military operational logic blurs, public distrust in state institutions could deepen, heightening tensions and potentially leading to public violence.

- **Judicial and social divides**: Disputes over judicial reforms have intensified divisions within Israeli society, leading to widespread protests and weakened social resilience. A war that gradually becomes politically controversial, combined with unilateral changes to essential democratic institutions, threatens to deepen societal fractures and hinder recovery.

- **Economic downturn**: In addition to a potential brain drain and a negative migration balance, the war over time could cause significant damage to the economy, including continuous declines in investment, possible boycotts (especially in the high-tech sector), disruptions to critical supply chains, and unsustainable increases in defense spending. This would limit resources for essential services like education, healthcare, and infrastructure while stalling economic growth and eroding living standards.

Countermeasures

The Defense Realm:

- A new defense doctrine should be developed, particularly for border security, focusing on forward security zones in critical areas. The principle of prevention must be translated into proactive strategies to address emerging threats.

- Plans should be implemented to retain combat soldiers and commanders, who are critical to long-term military buildup. A comprehensive overhaul of the current service model is necessary to effectively address present and future challenges.

- Combat pauses should be used strategically to restock supplies and restore operational readiness, ensuring stability in critical supply chains and bolstering domestic production capabilities during emergencies.

- A rigorous focus on military discipline, upholding the IDF's core values, and renewing the authority of command are crucial to maintaining operational efficiency and morale.

- A state commission of inquiry should be established alongside dedicated teams within the security forces to investigate the war's failures and implement lessons learned. Transparency and accountability are key to restoring public trust.

- A strategic plan must be developed to empower the police, with particular emphasis on combating crime in Arab communities, addressing organized crime, and reducing road violence.

- Israel must publish an updated national security doctrine, reflecting the new reality and the lessons of the current war.

The Socio-Economic Realm:

- Securing the release of all hostages.

- Rebuilding communities in the Western Negev and the North, providing economic incentives, fostering employment, and offering social support services to help residents return home.

- A solution to the constitutional crisis must be reached through consensus, potentially in the form of a "lean constitution" based on existing basic laws, including a Basic Law on Legislation.

- The value of equality should be enshrined in a Basic Law.

- Effective action plans for Israel's Arab society must be implemented with careful attention to improving opportunities and tackling organized crime.

- A comprehensive plan to increase conscription among underrepresented populations, including the ultra-Orthodox, Arab citizens, and others, should be developed. This may involve introducing mandatory civil-security service and expanding civil service opportunities.

- A strategic vision for attracting investment, supporting entrepreneurs, and mitigating investment risks is necessary to bolster Israel's economy. Special attention should be given to preserving human capital and promoting credit availability for businesses.

Afterword

The document presented here is the beginning of a process, not the end.

This is merely a platform for discussion and an invitation to dialogue based on the current evaluation of Israel's strategic environment. Therefore, it is appropriate that this discussion culminates in the publication of an official national security policy by the Israeli government.

With regard to the national security doctrine, it should not be fixed and rigid. Long-standing Jewish tradition and experience prove that oral doctrine is often stronger than written doctrine. And perhaps tradition should also be applied to the concept of national security doctrine. This is not the case with national security policy. Policy is the compass of the implementation strategy; it is the bridge between an abstract concept and its practical and binding implementation. Therefore, policy should be written by an elected government and adjusted whenever there are significant changes in reality and in government policy.

This document incorporates worldviews, values, and professional facts. We relied on the Declaration of Independence as a source of authority for the identity and vision of the State of Israel; we preserved the oral heritage in determining the national goals, founding principles, and imperatives of the doctrine. And we attempted to provide a solution in the policy document to the State of Israel's national security challenges at the beginning of 2025. There was, however, no attempt here to predict the future; on the contrary, the starting point was the present, with its many challenges. And based on the diagnosis of risks and opportunities, we formulated the policy recommendations.

Surprise: Black Swan events are inherently unpredictable. The key to navigating them effectively lies in maintaining flexibility, fostering doubt, questioning long-held assumptions, and engaging in open discourse that encourages listening, debate, and critical thinking. These principles, which we aim to uphold for ourselves and our readers, guided the thought process behind the development of our recommendations for Israel's necessary national security policy.

Thank you,

Institute for National Security Studies