

From Military Achievement to a Regional Arrangement

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Israel, since October 7, has been trapped in a conception of “absolute security” that drives it toward continuous war. If security is defined as the complete removal of every threat already in its earliest stages of emergence, and even more so when it is clear and tangible—rather than its reduction or the construction of a stabilizing political framework—then almost any other outcome of conflict will be perceived as insufficient, any arrangement as surrender, and any achievement as partial and therefore a failure.

Against this conceptual-political backdrop, in the current stage of the war with Iran, Israel faces two traps: (1) a ceasefire—without an effective settlement mechanism linked to a war-termination mechanism regarding the nuclear issue and ballistic missiles, which would leave it needing a continuous follow-up campaign and repeated rounds of strikes; (2) a “war of attrition” with no exit point. However, in order to leverage the military success against Iran into a strategic achievement—blocking Iran’s path to rebuilding its nuclear and missile capabilities, and ensuring regional stability—a mechanism for cooperation with the United States and moderate Arab states is required. Its purpose would be to advance four overlapping interests: weakening the regional radical camp and significantly reducing the Iranian threat; maintaining the US military presence in the region; expanding security cooperation with the United States and regional states; and promoting regional stability while preserving freedom of navigation, which is vital for economic development and strengthening the moderate camp.

Three Possible Scenarios for Ending the War

A. The likely scenario: A termination mechanism based on understandings between the United States and the surviving regime in Iran, to end the war in exchange for reopening the Strait of Hormuz and ensuring freedom of navigation, alongside continued negotiations on arrangements concerning the nuclear issue and missiles. There will be no decisive outcome, but rather a transition to a prolonged struggle to prevent the rebuilding of Iran's nuclear, missile, and proxy capabilities. In this situation, Iran will be weaker, but it may shift from a model of structured power projection to one of continuous disruption: extra-regional terrorism, decentralized activation of proxies, cyber warfare, threats to freedom of navigation, and covert reconstruction of strategic components.

B. The preferred scenario: A coordinated end—an arrangement that includes effective mechanisms for supervision, verification, and enforcement—not only on the nuclear issue but also regarding missiles, proxies, and freedom of navigation. Such an end scenario would require a sustained US military presence and a new regional order, within which Gulf states are also part of the arrangement.

C. The dangerous scenario: Prolonged attrition of Iran and internal destabilization that lead to broader regional chaos—damage to energy routes; waves of refugees from Iran; leakage of weapons from Iran to proxies; and competition among Turkey, Israel, Arab states, and external powers for influence in the region.

In this context, it is important to note:

The end of the war will not mean the end of the conflict. The likely outcome of the war is not the elimination of the threat but rather a transition to a campaign aimed at preventing the rebuilding of Iran's nuclear, missile, and proxy capabilities, alongside a reshaping of the regional order. The fundamental gap is between military achievement and the ability to translate it into a stable, effective, and binding political arrangement.

The Gulf states, which view the war as having been imposed upon them and see their détente approach toward Iran as having failed, seek to restrain Iran but also fear its collapse. For them, Iran is a serious threat, but its collapse or a prolonged war is seen as an even greater threat to stability and to their ability to realize their economic development and growth potential. Their priorities are twofold: to avoid becoming a battlefield while at the same time strengthening defense, deterrence, and security cooperation.

The consequences of the war could lead to a fundamental regional shift—a more fragmented and less stable Middle East. Proxies, militias, and terrorism inspired and led by Iran will not disappear. Lebanon, Iraq, Syria, and the Red Sea will remain arenas of friction, and the Iranian threat will renew itself—through missile production, offensive unmanned aerial vehicles (UAVs), attacks on civilian infrastructure, and Iran's willingness to turn the Gulf and its neighbors into a strategic battlefield. These implications underscore the need for as broad a regulatory framework as possible, involving states that seek stability and growth. This means that a coordinated response will be required to address challenges in energy, freedom of navigation in the Strait of Hormuz and the Red Sea, and the protection of civilian infrastructure.

Implications for Israel

Israel may gain an advantage from the war, but it may also face a situation of strategic overload: Although the Iranian threat will be less concentrated, it will require ongoing enforcement, the management of multiple arenas of conflict simultaneously—including distant ones—and consideration of the needs of its potential allies in the region.

However, since October 7, Israel has been largely captive to a conception of “absolute security,” which prioritizes operational freedom of action as a supreme principle—even though it is not appropriate to rely on it as a sole strategy. If freedom of action becomes the overriding objective, the result may be repeated cycles of fighting without a political horizon. Therefore, preserving the military achievement depends on the ability to shape a regional architecture and promote a security coalition with the United States and moderate Arab states, on the assumption that Iran is weakened but still functioning—not on the expectation of immediate regime change.

The realistic goal, therefore, is to deny Iran strategic capabilities over time—a goal that requires commitment from the United States as well as Washington’s other regional allies. At least in the initial stages, security cooperation is a more practical objective than normalization with Saudi Arabia or immediate expansion of the Abraham Accords. The Gulf states will not choose to cooperate with Israel out of affection but rather on the basis of fear, deterrence, and shared risk management. Accordingly, on the “day after the war,” they will seek to strengthen security cooperation with the United States and Israel while also ensuring that any new arrangement is not perceived as granting Israel the status of a “regional hegemon.” In other words, regional states do not want continuous war—even if that means Iran does not collapse; they seek to establish red lines vis-à-vis Iran, alongside defense and deterrence. Therefore, if Israel seeks to establish a regional security coalition, it will need to abandon the pursuit of absolute security in favor of a broader regional political framework in which it plays a constructive role.

In conclusion, Israel may find itself in a situation of operational victory against Iran alongside strategic failure. Even if, together with the United States, it inflicts very severe damage on Iran, if it fails to establish—together with Washington and moderate Arab states—a mechanism to prevent the rebuilding of Iran’s nuclear and missile arrays, it may end up in a paradoxical situation of military success without a political arrangement or a regional order. In such a scenario, Iran will continue its covert efforts to rebuild its nuclear and missile capabilities, while the Middle East will become even more dangerous, with a proliferation of semi-autonomous arenas of friction: Hezbollah weakened but not dismantled, Hamas retaining its power base in the Gaza Strip, the Houthis disrupting navigation in the Red Sea, militias in Iraq growing stronger, and Turkey seeking influence in Syria and Lebanon. This situation must be avoided through prudent judgment, long-term vision, and sound statecraft.

Editors of the series: Anat Kurz, Eldad Shavit and Ela Greenberg