

“Operation Roaring Lion”: Summary of the First Phase

Tamir Hayman | May 17, 2026

Key Points

The war against Iran and its proxies is currently in a lull, alongside diplomatic negotiations between Iran and the United States. This is the most extensive campaign in the Middle East since 2003, and the first in which Israel has fought as an active partner in a coalition with the United States. Despite tactical achievements, the campaign's two main centers of gravity—the Iranian regime and the nuclear project—remain essentially unchanged.

The path to war was paved after the previous campaign (“Operation Rising Lion,” June 2025) failed to establish a permanent solution, and Iran demonstrated a rapid and dangerous recovery capability:

- **Nuclear Domain:** The rehabilitation of the Fordow site and the accelerated construction of “Pickaxe Mountain,” (allegedly) immune to airstrikes.
- **Missile Domain:** A production rate of approximately 125 missiles per month (from 1,500 missiles at the conclusion of “Operation Rising Lion” to 2,500 at the outset of “Operation Roaring Lion”).
- **Proxy Strategy:** Rapid rehabilitation of Hezbollah (doubling of the budget and renewal of supply routes through Syria), despite the fall of the Assad regime.

Challenges in Managing the Campaign

- **Gap Between Political and Military Echelons:** The political ambition was regime change, while the stated military objective was the attrition of Iranian capabilities.
- **Regime Resilience:** The Iranian leadership shifted to a decentralized command structure, and Mojtaba Khamenei was appointed Supreme Leader—a move that prevented a power vacuum despite the elimination of senior officials.

- **The Strait of Hormuz:** The closure of the Strait created global leverage that reshaped American priorities and diverted attention toward energy security and national infrastructure.
- **Strategic Subsurface Facilities:** The war demonstrated the limitations of air power. Most nuclear and missile assets survived in deep-underground bunkers.

Regional Implications

- **The Gulf States:** The war undermined their hedging strategy and their image as a "safe haven." Improved relations with Tehran failed to buy them protection against Iranian brutality.
- **Lebanon:** Hezbollah's entry into the campaign sparked sharp criticism within Lebanon and prompted direct discussions between the Lebanese government and Israel. The "Yellow Line" in Southern Lebanon reduces threats but endangers IDF forces on the ground and grants Hezbollah renewed legitimacy as the "Defender of Lebanon."
- **Israel's Standing:** Military cooperation with the United States is at an all-time high, and Israel's military capabilities have enhanced its strategic value. Conversely, its diplomatic standing has weakened due to the perception that it dragged the U.S. into a war that was not its own, and due to its identification with the Trump administration.

Main Alternatives and Recommendations

Applying pressure on Iran through a partial blockade is important to soften its positions in negotiations with the United States. However, a prolonged policy of "neither agreement nor strike" is a dangerous gamble, as it may allow Iran to attain the status of a nuclear threshold state (whether through a desert test, a "bomb in the basement," or nuclear ambiguity).

Therefore:

- **Vis-à-vis Iran:** Israel, together with the United States, should pursue a stringent agreement that includes intrusive inspections and the dismantling of capabilities. Alternatively, it should pursue military action that would leave Iran without strategic bargaining chips ahead of the final stage of negotiations.
- **In Lebanon:** A model should be adopted that mandates the disarmament of Hezbollah in exchange for an IDF withdrawal. Drawing inspiration from solutions being considered for the Gaza Strip, an international military force should assist the Lebanese government in enforcing the disarmament process.

The Bottom Line: Israel has restored its tactical deterrence, but the strategic crossroads regarding the Iranian nuclear challenge still lies ahead.

"Operation Roaring Lion," the war against Iran and its proxies, has not yet reached its conclusion. Although the final outcome remains unclear and the current situation may soon shift, the campaign's distinctive characteristics allow for an interim assessment. This is the most extensive war fought in the Middle East since the Second Gulf War, and the first in which Israel is fighting as an active partner in a coalition with the United States. While its global implications have yet to fully emerge, it is already clear that the war carries significant implications for the Gulf States, the global energy market, Israel's international standing, and great-power competition.

Part One: The Path to War

The 12-Day War ("Operation Rising Lion") succeeded, within a short period of time, in setting back Iran's nuclear project, temporarily degrading its missile production effort, and demonstrating its military inferiority relative to Israel. Iran's proxies remained inactive during the campaign, and it appeared as though Israel had emerged victorious. However, by the concluding day, it was already clear that the achievement was unstable.

In the nuclear domain, the primary achievement was pushing back Iran's breakout time for fissile material from two weeks to at least three to six months, through the neutralization of enrichment facilities, the destruction of centrifuge production plants, and the elimination of prominent nuclear scientists. However, as long as the regime remained intact, the problem persisted. In fact, Iranian motivation to acquire nuclear weapons may even have intensified. Given that Iran is a large state with advanced scientific capabilities, the damage was recoverable. The most stringent professional assessment held that the breakout timeline for a nuclear weapon would be approximately one year, including roughly six months for the accumulation of fissile material.

And that is precisely what happened. In the months following the war, Iran worked to restore its uranium enrichment capabilities at two central sites: Fordow, which had not been completely destroyed, and "Pickaxe Mountain," a subsurface facility (perceived by Iran to be more secure than Fordow) whose construction was accelerated. In the domain of nuclear warhead development, which had sustained severe damage, recovery was slower, but the Islamic Revolutionary Guard Corps (IRGC) accelerated its development efforts.

In the domain of surface-to-surface missiles, despite the heavy blow to the production infrastructure, recovery was rapid: approximately 1,000 missiles were manufactured within eight months, and warhead capabilities became more sophisticated.

Developments on the proxy front were also troubling. Iran renewed the financial pipeline to Hezbollah: according to open-source reports, hundreds of millions of dollars flowed over a six-month period through the United Arab Emirates (UAE), Turkey, front companies, and informal money-transfer networks. Contrary to assessments, the fall of the Assad regime did not "break" the land bridge between Iran and Lebanon; Iran successfully restored the overland weapons-

transfer route through Syria, utilizing it to deliver advanced weapons systems to Hezbollah. The remainder of the organization's rehabilitation was carried out through procurement from Syrian arms dealers, domestic production, the appointment of new commanders, and the restoration of communication systems.

In sum, Iran recovered more quickly than anticipated across all components of its national security. The pace of recovery reflected an intensified focus on the nuclear program and SSMs (Surface-to-Surface Missiles), as well as a determination to carry out "Operation True Promise 4"—Iran's planned retaliation for the 12-Day War. It appeared that another preventive war would be necessary and that the question was one of timing alone.

The Trump Effect and the Waiting Period

In late December 2025, a new wave of protests against the regime erupted in Iran. Its intensity was moderate compared to previous waves of unrest, but this time the leaders were from the middle class (the Bazaar merchants), and it quickly spread to other segments of the population. The regime's violent crackdown prompted President Trump to post on his social platform that "Help is on the way." Encouraged by his success in Venezuela, Trump declared his commitment to the Iranian people and his intention to strike Iran. The announcement caught Israel by surprise, as it sought additional time to strengthen its defenses.

Israel's position was that if President Trump was indeed determined to act, it was preferable to execute a broader plan at a timing that would allow for enhanced defense. To achieve this, approximately two months were required for the buildup of American forces in the Gulf, joint operational planning, and the reinforcement of Israel's defenses.

Part Two: War Objectives and Their Implementation

The uniqueness of "Operation Roaring Lion"—and perhaps its primary source of complication—lies in the absence of total commitment to a single, clearly defined objective. Both militaries entered the campaign amid a lack of coherence between the political leadership's vision and the military plan. While there was a desire within the military echelon to bring about regime change in Iran, the military campaign itself focused on the removal of threats.

The gap stemmed from the distance between aspirations and capabilities: the political leadership in both Israel and the United States viewed regime change as a worthy objective, one that may even have tipped the scale in favor of going to war. The military leadership in both countries, however, made clear that regime change could not be achieved through a firepower-based campaign alone. As a result, the formal military objectives were reduced to "creating the conditions" for regime change and degrading threats. The overthrow of the regime remained a "political supreme objective"—a clear aspiration, but not a binding operational goal. (One may speculate that had Trump's sole focus been the removal of threats, he would have agreed to a pause only after eliminating the gravest threat of all—the nuclear program.)

Although regime change was defined merely as an aspiration, the first stage of the campaign—from the decapitation operation targeting senior leadership to the cancellation of the Kurdish incursion—focused primarily on that objective. The "crown jewel" was intended to be the

Kurdish operation: an incursion by Kurdish fighters into Iran, which was expected to heighten inter-ethnic tensions, destabilize the regime, and create the conditions for the rise of a new, moderate government. This operation served as the keystone for a series of additional covert operations with similar objectives. Combined with the historic opportunity created by President Donald Trump's declarations and willingness to act, these efforts likely formed the basis for the belief that the regime could be overthrown.

However, Trump himself canceled the Kurdish operation, likely due to opposition from Turkey, which views the Kurds as a threat, and from Arab states that fundamentally oppose the fragmentation of the Arab "nation-state" into tribes and sectarian groups. Once the covert operations were removed from the equation, the primary mechanism for destabilizing the regime's stability was eliminated. Meanwhile, Iran succeeded in transferring authority to a new Supreme Leader and, amid the fighting, established a functioning command-and-control system, without desertions.

The second phase (from the fifth day until the ceasefire) focused on the attrition of capabilities. Its objective was the gradual removal of strategic threats. This effort resembled an organized industrial process of target destruction carried out according to a predefined plan, relying less on stratagem and flexibility and more on techno-tactical excellence. The primary strike missions included: the destruction of the IRGC Air Force and Navy; the dismantling of the Iranian military industry, including its internal supply chain; strikes against internal security organizations; and the destruction of the nuclear project through an innovative and unique approach. The ultimate "crown jewel"—the destruction of the nuclear program—was not fully realized by the time the first lull took effect.

Operational Configuration

The operational configuration is the tactical translation of the chosen strategy—the integration of efforts, timelines, and required objectives. Because the strategic vision was both complex and evolving, the operational configuration was likewise subject to continual shifts.

Military doctrine traditionally distinguishes between two approaches to achieving decisive victory: decisive victory through maneuver and decisive victory through firepower (attrition). Both combine firepower and maneuver, but their configurations differ. In the maneuver approach, victory is achieved by concentrating effort against a center of gravity with maximum force and in minimum time. In the attrition approach, victory is pursued through the gradual, systematic destruction of the enemy's capabilities. Regime change generally requires a maneuver-based approach.

Military history recognizes only two cases in which a regime was overthrown through firepower alone: the Hirohito regime in Japan during World War II, and the Milošević regime in Kosovo (1999). Even in these instances, scholars continue to debate whether firepower alone was responsible for the outcome. Thus, despite the political vision calling for regime change, the military implementation ultimately took the form of attritional degradation of capabilities and the removal of threats.

"Operation Roaring Lion" was conducted according to an attrition-based approach along four central axes:

1. Elimination of senior leadership and disruption of command-and-control systems in a manner that threw the enemy off balance.
2. Destruction of the IRGC Air Force.
3. Destruction of all Iranian naval capabilities—both those of the IRGC and the conventional armed forces (Artesh).
4. Destruction of the nuclear project.

The war was managed jointly by Israel and the United States under American leadership. The IDF played a dominant role in several areas: striking targets within the center of gravity (Tehran), maintaining aerial superiority, and reducing the scale of Iranian missile fire through the hunting of launchers and the sealing of missile tunnel sites—an effort that required the use of a massive quantity of air-to-surface munitions.

Part Three: Disruptions and Challenges

"Man plans and God laughs"—a saying that applies doubly on the battlefield.

Three factors disrupted the planning process and hindered the achievement of the war's objectives: regime resilience, the Strait of Hormuz, and strategic subsurface infrastructure.

1. A New-Old Regime

The Iranian regime is not built around a specific individual, but rather around an ideological concept: the Rule of the Jurisprudent, managed through a system of institutions characterized by redundancy and mutual checks and balances. Consequently, the elimination of the Supreme Leader is not equivalent to regime change.

True regime change implies a fundamental shift in concept: a transition to a military dictatorship, a secular presidential system, or a democratic regime. By these criteria, regime change was not achieved in Iran. The new leadership differs from the one it replaced, though not necessarily for the better.

How did Iran manage to execute such a complex transfer of authority during the most intense phases of the war? The short answer: Ali Larijani's (Secretary of the Supreme National Security Council, until his elimination) composure in implementing the Iranian constitution to the letter. The constitution ensures stability in the event of the Supreme Leader's death through a three-member temporary leadership council: The President (executive authority), the Head of the Judiciary (judicial authority), and a Representative of the Assembly of Experts, Ayatollah Arafī (spiritual authority). This structure guaranteed an immediate filling of the vacuum at the top of the system. Although the appointments themselves did not prove particularly effective and the body's decisions had little impact on the course of the war, stability was maintained: no military commander attempted to "take charge" via a coup.

Within the military command structure, the eliminated commanders were replaced, most notably the commander of the Khatam al-Anbiya Central Headquarters and the Commander of the IRGC. Surprisingly—and suspiciously—no new Chief of Staff was reportedly appointed to the Artesh (possibly intended to strengthen the relative power of the IRGC). The newly appointed commanders were experienced and senior figures, but their performance in the early days was deficient. Fear of elimination forced them to operate in highly restricted meetings, while constantly evading Israeli pursuit.

Nevertheless, the Iranian military system continued to function. The explanation for this lies in the decentralization of authority implemented prior to the war as part of the lessons learned from the 12-Day War. The understanding that the surprise elimination of the entire chain of command was a plausible scenario prompted the system to design a campaign capable of operating without top-down orders. Authority to deploy strategic capabilities—such as launching ballistic missiles (including against civilian targets in the Gulf) and the closure of the Strait of Hormuz—was delegated to field officers who did not require prior authorization before acting.

This decentralization, however, created problems. It led to the Iranian embarrassment following the strikes on Oman and on civilian infrastructure in the United Arab Emirates. These actions ran counter to the wishes of the senior command, especially given Iran's future dependence on the Emirati financial system.

The resilience of the regime was further demonstrated by the appointment of Mojtaba Khamenei as Supreme Leader. This move was executed at the behest of the IRGC, and contrary to the wishes of his father, Ali Khamenei, who had explicitly instructed that the next leader be chosen from among the religious jurists. Mojtaba's appointment was conducted in accordance with the constitution: through a physical convening of the 88 members of the Assembly of Experts in the holy city of Qom and by majority vote (54 members). Similar to the deficient functioning of the temporary leadership council, Mojtaba himself barely functioned during the initial days. His medical condition and fears of assassination led him to disappear from public view. Regardless, the very existence of a leader possessing spiritual authority helped stabilize the system and prevented any revolutionary initiative from emerging.

The elimination of Ali Larijani brought the Speaker of the Parliament Mohammad Baqer Qalibaf to the forefront. Qalibaf is perceived by the U.S. administration as a convenient interlocutor for deals. When Trump speaks of a "new leadership with which business can be done," he is likely referring to him. Yet Qalibaf is far from a dominant ruler. He is caught in the middle of a dispute between the political elite (the foreign minister and the president) and the security leadership (the Central Headquarters and the commander of the IRGC), and he does not dare to issue a ruling without explicit instructions from the Supreme Leader. Because the Supreme Leader is disconnected from all digital communication channels, communication with him is likely conducted via handwritten notes and couriers, a process that takes considerable time. This explains, at least in part, the inefficiency of mediation efforts in the negotiations.

In any event, from the second day of the war onward (with the appointment of the temporary leadership council) and especially from the ninth day onward (with the appointment of Mojtaba), it became clear that the shift in Iranian leadership was marginal. Although the IRGC became more dominant and the command-and-control system less efficient, given the scale of the military pressure applied—frequent eliminations, strikes on headquarters, forcing commanders to constantly seek alternative command posts, or disrupting their ability to exercise control—it is not surprising that the Iranian system has entered negotiations with a pronounced confidence mentality.

2. The Global Pressure Point: The Strait of Hormuz

The blockade of the Strait of Hormuz did not come as a surprise to intelligence agencies; the surprise lay in its timing and method. The blockade was carried out earlier than anticipated—as a radical leverage mechanism, this move was expected at a more advanced stage of the campaign. The overwhelming opening strikes of the initial days, combined with Iran's decentralized command structure, created a situational surprise in terms of timing.

As for the method: closing the Strait by deploying moored naval mines in the middle of shipping lanes represented the most extreme measure available. The Strait could have been closed through the threat of explosive UAV strikes or maritime enforcement measures, but naval mines are incredibly difficult to clear, rendering the closure effectively hermetic.

The closure of the Strait altered the course of the war and redirected American attention toward efforts to reopen it. Within the American military echelon, the idea emerged that Iran could be defeated at sea: President Trump's strategic victory would consist of securing control over the Strait of Hormuz and redirecting the vital resources flowing through it. Consequently, the prioritization of air strikes shifted, and the planned fire campaign was disrupted. The significance of the Strait—not only to the energy market but also to the global food supply (fertilizers, particularly in developing nations)—transformed a worst-case scenario into the actual war scenario.

The closure of the Strait created the first prominent divergence between Israeli and American interests. While the Strait is of limited importance to Israel and does not directly affect its citizens (except indirectly through global oil prices), in the United States it affects every American citizen who pulls into a gas station. More importantly, Iran succeeded in humiliating the United States by imposing its will on it, and on the global community, through military force.

The United States attempted to assemble a coalition to reopen the Strait, only to find itself standing alone. Israel contributed sparingly to the effort, and not a single additional nation responded to the American appeal. Trump's primary disappointment was directed at European nations and NATO members, whose refusal was perceived as outright abandonment. The European refusal stemmed from two reasons. First, they had not been consulted prior to the outbreak of the war; "You cannot build a coalition retroactively," as one senior European ambassador put it. Second, Europe has effectively been at war for approximately four years and is in no position to open an additional front.

Thus, the closure of the Strait of Hormuz provided Iran with a new source of global leverage beyond the nuclear issue, and Tehran has sought to exploit it to the fullest extent possible. Negotiations between Iran and the United States, which were originally intended to focus on civil rights, the dangerous nuclear project, and Iran's terrorist infrastructure, have transformed into talks over the transit regime in the Strait of Hormuz. Furthermore, Iran has discovered a new source of revenue for its depleted coffers through the taxation of ships passing through the Strait.

3. Subsurface Facilities: The Zone of Immunity for the Nuclear and Missile Projects

At the time of the ceasefire, Iran still retained 60% to 70% of its missile launch capabilities (missiles and launchers) as well as enriched nuclear material (440 kg of uranium enriched to 60%, hundreds of kg enriched to 20%, and several tons of uranium enriched below the 20% level). Despite precise intelligence and the impressive strike capabilities demonstrated by Israel and the United States, the primary headquarters of the Iranian Central Command (Khatam al-Anbiya and the IRGC) were not destroyed. Numerous strikes achieved only partial and temporary neutralization; the headquarters returned to full functionality within a short time, and the survivability of the military command-and-control system was maintained. All of this was made possible by subsurface infrastructure.

In the current era, subsurface facilities illustrate the limitations of air power. Aerial fire inflicted severe damage on the enemy, eliminated leaders, destroyed ready-to-launch platforms, damaged Iranian internal security organizations and the military industry, and reaped significant tactical achievements. However, it failed to degrade the centers of gravity: command-and-control, ballistic missiles, and the nuclear program.

This point is paramount: if the war resumes, this lesson must be drawn; and if an agreement is reached, the issue of subsurface facilities must stand at the very center of the discussions. Nearly everything above ground can be monitored and destroyed. The subsurface infrastructure requires a completely different solution, one that is intelligence-based and operational.

The IDF demonstrated impressive capabilities in the domains of firepower and intelligence, but this superiority did not translate into a sustainable achievement underground. This same pattern occurred in both the Gaza Strip and Lebanon. Therefore, this is not merely a situational lesson ahead of a potential renewal of hostilities against Iran, but a long-term lesson for force design and for directing procurement and weapons-development resources toward capabilities that would provide the IDF with decisive intelligence and maneuverability in the underground domain.

Part Four: Long-Term Implications of the War

The war is not yet over, but it is already possible to identify the changes it has forged in both the regional and global arenas. This analysis focuses on the three developments most consequential for Israel's security doctrine, all of which are already evident at this stage (regardless of whether the war ends or resumes):

1. The Collapse of the Gulf States' Security Doctrine

The three core principles of the Gulf states' national security doctrines were completely undermined during the war, a development that necessitates a fundamental shift in Israel's own security doctrine. Although the war has not yet ended and the lessons derived by the Gulf States may still evolve, it is important to examine these developments now in light of the opportunities they create, including in the event of a renewed conflict:

A. The Collapse of the Hedging Concept

The hedging concept held that states should maintain diplomatic relations with all sides in both the global and regional great-power competition, and that extensive trade relations, combined with the avoidance of total alignment with any single side, would generate stability and prosperity. This was the rationale behind the Gulf States' close ties with China, Russia, and Iran.

However, this concept failed to prevent Iran from launching severe attacks against its neighbors. Hedging proved equally ineffective in relation to Russia and China: Iran's allies did nothing to restrain the attacks directed toward the Gulf States, and even assisted Iran in ways that compounded the damage. The weapons systems that enabled the Gulf states to defend themselves and carry out offensive operations were not of Chinese or Russian origin; rather, Russian-Chinese backing provided Iran with an economic lifeline (through oil procurement).

The Gulf States offered Iran financial incentives in exchange for halting the attacks, to no avail. Iran's brutality, which extended far beyond strikes directed "only" at American assets in the region, was clearly illustrated. Explanations suggesting that the attacks stemmed from a lack of centralized control resulting from Israel's disruption of Iranian command-and-control systems failed to convince the Gulf States, and in fact, worsened their conclusion: if Iran's leadership is incapable of controlling its own military, then what value does hedging hold? Iran cannot be relied upon as a source of stability, and its military capabilities pose a danger to the region.

B. The Undermining of the "Safe Haven" Concept

For a decade, the Gulf States have sought to convince the world that they are the safest place on earth, a place worth building computing infrastructure and ports, and a premier hub for commerce, sports, and culture: "The Gulf as a safe, stable, and prosperous oasis." This concept has been severely undermined. Iran targeted precisely the components most vital to these states: Amazon's computing and storage infrastructure, airports (including the world's largest), seaports, luxury hotels, and renewable energy infrastructure. Security constitutes a foundational component of the Gulf economy: approximately 90% of the UAE's population consists of foreign workers, and a lack of security could prompt them to leave—a departure that would destabilize the economic foundation itself. Furthermore, the Gulf's status as a global transit and freight hub has been severely damaged: confidence in the reliability of safe passage through Emirati infrastructure, which is critical for economic development, has been undermined.

C. The Oil Economy and Its Curse

The Gulf States rely on oil as a central component of their economy. While dependence on a single resource drives them to develop alternatives, they remain heavily dependent on it. The blockade of the Strait of Hormuz illustrated the vulnerability of this economic model: Iran demonstrated that it holds the keys to the Gulf, delivering a jarring wake-up call. This is not a new realization; economic diversification and shifting away from oil are core components of Saudi Arabia's and the UAE's Vision 2030 plans. However, the collapse of the hedging strategy, combined with the shattering of the safe haven image, creates a particularly troubling cocktail.

Everything depends on timing: a similar crisis a few decades from now would not have had the same impact, since by then the necessary resilience might already have been built. Nevertheless, the transition from an oil-based economy to one centered on services and high tech may ultimately benefit cooperation with Israel. Israel's military capabilities, which were clearly demonstrated during the war, could incentivize the Gulf States to deepen ties with Israel, despite the difficulties stemming from Israel's image among the Arab public.

2. Lebanon and Hezbollah: The Collapse of the Concept of “Resistance as Lebanon’s Protector”

It took Iran 40 hours to compel Hezbollah to enter the campaign. During the 12-Day War, the Supreme Leader did not demand this of Hezbollah; this time, however, his death was perceived as a binding final testament. Even so, it required a period of persuasion and aggressive pressure. The hesitation did not stem from operational difficulties, but rather from the organization's sensitive position within Lebanon.

For months, the Lebanese government had been demanding, with courage and determination, that Hezbollah disarm. Although a significant gap exists between these resolute declarations and the Lebanese Armed Forces' halting implementation of this goal against Hezbollah, the internal discourse in Lebanon has shifted. At the height of this process, Hezbollah attacked Israel and once again plunged Lebanon into war, contrary to Lebanese national interests. This time, the organization found it difficult to conceal its motives: it was glaringly obvious that it acted at Iran's behest, and will likely bear a heavy political cost as a result. For the first time, criticism may even emerge from within the Shiite community, which continues to bear the brunt of the destruction in the villages of Southern Lebanon.

From Hezbollah's perspective, its phased entry into the conflict was managed with considerable sophistication. It was designed to convince Lebanese public opinion that its response was merely symbolic and confined to the area north of the Litani River, and that any subsequent escalation was the result of Israel's reaction. In practice, however, the decision to join the war had already been made on the first day; Hezbollah maintained combat infrastructure and fighters south of the Litani but refrained from deploying them until March 5.

This phased entry proved successful: many interpreted Hezbollah's initial operations as symbolic, while the absence of fire from south of the Litani was viewed as evidence of diminished capabilities (allegedly resulting from the implementation of the demilitarization

agreement). The attempt to pin the blame on Israel for the expansion of the war was partially successful. Although Lebanese citizens largely understood who was responsible for the escalation, concerns emerged in Israel that the IDF's harsh response itself had triggered Hezbollah's entry into the campaign. It should be emphasized that Hezbollah leader Naim Qassem had decided to enter the war prior to the IDF's large-scale response to the initial fire from Lebanon.

Hezbollah has been significantly weakened militarily, yet even 10% of the capabilities it possessed prior to its conflict with Israel, which ended in November 2024 with a ceasefire agreement, still amounts to a threat of approximately 15,000 rockets and missiles. This threat came as something of a surprise to the Israeli public. The decision not to evacuate communities this time, combined with boastful declarations from senior political officials regarding the "dismantling of Hezbollah" as the war objective, created an impossible reality: it is clear that the IDF is currently incapable of conquering Lebanon and forcibly disarming Hezbollah. Against Hamas, a far weaker organization, it took three years to understand that such a total victory was unattainable. The disarmament of Hezbollah is certainly not feasible while simultaneously fighting a war against Iran, particularly when Lebanon has been designated a secondary front and the Chief of Staff is raising "ten red flags" regarding the IDF's manpower situation.

What can be done now? With the ceasefire in Lebanon now in effect, imposed on Israel by President Trump, two achievements and one grave threat can be identified. The achievements: First, for the first time since the First Lebanon War, direct and official negotiations are taking place between Lebanese and Israeli representatives. This is an explicit expression of normalization. Second, the establishment of a "security zone"—the creation of a buffer area designed to reduce the tactical threat from Lebanon while also serving as a highly valuable strategic bargaining chip (if utilized as such). Conversely, without a genuine solution regarding Hezbollah, the prevailing sentiments among residents of northern Israel (loss of trust, insecurity, mass abandonment) are entirely justified in light of what appears to be a prolonged war.

The security zone created the "Yellow Line"—a line of ground occupation between which and the international border there are no civilian populations or infrastructure, thereby minimizing the risk of guerrilla warfare within the occupied territory. While this buffer zone neutralizes the threat of direct fire, it does not prevent high-trajectory fire, explosive drones, and UAV attacks, most of which are launched from north of the Litani River; nor does it prevent Hezbollah from attacking the buffer zone from territory located further north. As a reminder, even during the security zone period following the First Lebanon War, the majority of attacks originated from areas north of what was then the "Red Line."

Without American intervention, fighting in Lebanon would have resumed by now, particularly through airstrikes in Beirut. Yet, it is doubtful that such fighting would have led to Hezbollah's dismantling. Furthermore, even if, in the absence of American constraints, mounting public pressure had driven the political echelon to decide to conquer all territory up to the Litani River,

such a move would neither have dismantled Hezbollah nor prevented fire originating from north of the occupied territory.

Conversely, occupying and holding territory up to the Litani over time would require a much larger order of battle (ORBAT). It would also reinforce Hezbollah's "Resistance" narrative as the defender of Lebanon fighting "Israeli occupation," and likely fail to address the security demands of residents of northern Israel.

Paradoxically, the solution may lie within the American constraint itself. While U.S. involvement in Lebanon is a tactical constraint, it could ultimately provide the strategic solution Israel needs: an adapted version of the solution framework devised for Hamas (which has yet to be implemented)—namely, the creation of an international oversight mechanism to enforce Hezbollah's disarmament in exchange for a package of incentives for Lebanon's rehabilitation and an Israeli withdrawal to the international border, under an internationally guaranteed agreement.

3. Israel in the International and Regional Arenas: Between the Image of the "Skilled Warrior" and that of the "Cunning Bully"

Israel's standing in the international arena has been weakening in recent years. This deterioration did not begin on October 7, 2023, but it accelerated significantly amid the prolonged war in the Gaza Strip and its consequences. Among naive and uninformed youth, the Israeli-Palestinian conflict has been branded as "the struggle of the weak, the Black, and the exploited against white, racist Western colonialism." This process gained backing through legal proceedings at the International Court of Justice (ICJ), where baseless accusations of genocide were granted a degree of legitimacy. Against this backdrop, the war in Iran has only worsened the situation.

In the United States, Israel is accused of having pushed President Trump into a war against Iran contrary to American interests. Even some of the president's most ardent supporters—the MAGA constituency—reject the war and openly criticize it. Within the Democratic Party, opposition to arms sales to Israel has become consensus. Thus, despite unprecedented military cooperation and close coordination between President Trump and Prime Minister Benjamin Netanyahu, the situation remains severe: Israel's identification with Trump effectively compels his critics to view Israel through the same lens. The "day after Trump" is expected to present Israel with far more severe challenges, as it will likely have to contend with an adversarial president.

The problem, however, lies not only in this single-party identification, but also in the perception that Israel has fundamentally altered its practical security doctrine.

Israel is no longer perceived as a state striving for peace and political settlements with Arab nations, but rather as a state pursuing security through endless war, including the occupation of portions of neighboring Arab countries in order to establish security buffer zones. Its standing is shifting from that of a nation that once garnered broad sympathy when it declared that "the

challenges of peace are preferable to the agonies of war," to that of a state embracing the ethos of "both Athens and Super-Sparta."

Across the Middle East, a belief is spreading that Israel seeks to realize the vision of "Greater Israel," stretching from the Euphrates to the Nile. This vision has even been officially referenced in a document of the Ministry of Foreign Affairs and in remarks by the Prime Minister, who stated in an interview that he "connects deeply with the vision of the Complete Land of Israel."

This perception fuels Arab fears regarding Israel as a rising "regional hegemon." Opinion leaders and journalists in Saudi Arabia assert that Israel aspires to regional hegemony or, as phrased in a document published by the Dado Center for Interdisciplinary Military Studies: shifting "from a villa in the jungle to the queen of the jungle." This aggressiveness is perceived as a threat by regional states; while it generates deterrence, it may also provoke a backlash that constrains Israel's maneuvers in the region.

On the positive side, Israel demonstrated significant military and intelligence capabilities. At the onset of the war, the Gulf States—primarily the UAE and Bahrain—came under attack, likely due to their association with the "Abraham Accords." In response, Israel acted swiftly to transfer defense capabilities to these states. No formal expressions of gratitude should be expected, but exposure to Israel's unique capabilities will inevitably strengthen ties with them.

Israel's capabilities also impressed U.S. military officers: the capacity to rapidly integrate intelligence and firepower, together with the agility and flexibility of the Israeli military system, left a strong impression on the American partner, who at times even appeared envious of the IDF's tactical excellence.

Israel has restored the deterrent security standing it lost on October 7, but many view it as having gone a few steps too far—steps that distance it from the community of Western nations. Against this backdrop, the manner in which this war ends will be critical for the future of Israel-U.S. relations. If the war is recorded as a failure in the annals of American history, Israel will bear at least partial responsibility. If the fighting resumes and the American cost rises without a shift in the outcome, the implications for Israel will be even more severe. However, if a resumption of the war fundamentally reshapes reality over the long term—through the complete destruction of the nuclear program, restrictions on missile range, the cessation of terror financing, and the unconditional reopening of the Strait of Hormuz—then Israel will be part of a historic American victory in the Middle East.

Herein lies the dilemma facing President Trump: a high-stakes gamble between historic triumph and dangerous defeat.

Part Five — The Path Forward: Three Strategic Alternatives

In Israel, it is widely accepted that Iran poses a grave threat to both Israel and the broader Middle East, and that its nuclear project endangers global stability. This assessment is also prevalent within the American defense community, and in many instances, in Europe as well. To address this threat, three distinct pathways have been formulated over the years: nuclear agreement, war, and sustained economic pressure.

All three approaches seek to advance two objectives: reducing threats and destabilizing the regime in a manner that accelerates its demise. In the current interim period, all three options remain on the table, making the debate surrounding them more relevant than ever.

1. A "Good" Agreement

The chief architect of this approach was former President Barack Obama. According to his conception, a nuclear agreement would prevent nuclear threat for a decade, based on Iran's agreement to halt its nuclear program in exchange for sanctions relief. Obama believed that opening Iran to the global market would generate positive internal transformation—a kind of "Persian Spring."

The first component of the agreement, the JCPOA, functioned effectively: Iran did not violate the deal and constrained its nuclear program, at least until Donald Trump withdrew from the agreement in 2018. The second component, however, failed. The JCPOA had significant flaws (including sunset clauses and the absence of oversight over the weaponization group), but in one important respect it succeeded: it froze the nuclear project and rolled back Iran's capabilities.

- **Main Advantage:** Freezing the nuclear project.
- **Main Disadvantage:** Providing an economic lifeline to the regime.

The current situation: Iran is in a dire economic state and desperately requires sanctions relief. The new Supreme Leader, who survived an assassination attempt and lost members of his family, is more radical than his father and appears receptive to the possibility of nuclear weapons. He is not bound by his father's religious decree (fatwa) prohibiting the development of nuclear weapons; from a religious-legal standpoint, the fatwa itself "died" along with its author.

Iran has endured two major wars within a single year, and its leadership's likely conclusion is that only nuclear deterrence can prevent the next war. Therefore, a new, far more stringent agreement is required, one that includes the complete dismantlement of the nuclear program and intrusive, rigorous international oversight exceeding that of the JCPOA.

The agreement must push Iran back to a breakout timeline of at least one year for fissile material, and at least two years for a nuclear weapon. To achieve this, it will not be sufficient to merely remove uranium enriched to 60% from Iran or temporarily prohibit enrichment on Iranian soil. The following measures would be required: removal of all enriched material from Iran (including lower-grade uranium); a total prohibition on underground enrichment facilities (with any future facilities to be constructed above ground and under American supervision); a ban on the production and development of advanced centrifuges, along with the destruction of existing ones; and reliable, enhanced monitoring mechanisms.

These demands will be unacceptable to Iran, which will instead attempt to return to the previous agreement and market it to the United States as a "better deal" (one without an enrichment option), in hopes that Trump will agree, declare victory, and end the war.

The Bottom Line: A very good nuclear agreement would improve Israel's security posture, but only if it includes the components outlined above.

2. "Neither Agreement nor Strike"—Sustained Economic Pressure

The individual most closely identified with this approach is likely President Trump. Following his withdrawal from the nuclear agreement, he devised the "maximum pressure campaign"—effectively seeking to "dry out" the regime until its collapse. Because Iran's situation is dire, and regimes like the one in Tehran tend to collapse from within, the objective of this approach is to worsen Iran's economic distress and deepen its international isolation, thereby increasing the likelihood of the regime collapsing through an internal uprising.

- **Main Advantage:** Weakening the regime's effectiveness in coping with a severe economic crisis.
- **Main Disadvantage:** Placing no restrictions on the nuclear project or military force buildup, which would necessitate sustaining achievements through additional military operations.

The current situation: Iran is in crisis, and internal unrest reached its peak prior to the war. However, the regime's survival during the war has enhanced its image and its perceived strength in the eyes of the Iranian citizen. Furthermore, the large number of non-combatant casualties (1,500–2,000) triggered a rally-around-the-flag effect.

The desire among new regime officials to exact revenge for the protests that preceded the war—and which they view as having contributed to its outbreak—could also deter dissidents. At the same time, Iran retains the capability to swiftly revert to a military nuclear program (possessing the knowledge, advanced centrifuges, and underground enrichment sites), while a reconversion facility could be rebuilt within only a few months.

Maintaining Iran under a state of siege in order to influence its decision-making is a sound idea and may indeed affect the calculations of the Supreme Leader. However, turning this state of affairs into a permanent strategy aimed at regime change is a dangerous gamble: states like North Korea have historically chosen to sacrifice the welfare of their citizens on the altar of nuclear capability. There is a real danger that the new Iran, whose leadership relies heavily on the IRGC, could follow a similar path. Regimes that ultimately collapsed due to international isolation, such as the Soviet Union and South Africa, only fell after years of sustained pressure, and not under short-term siege.

3. War

According to this approach, which was tested during "Operation Roaring Lion," a military campaign would destroy Iran's nuclear capability, while a sequence of special operations would destabilize the regime to such an extent that, even if it does not fall during the war, its ultimate collapse would only be a matter of time. Thus far, however, the current war has not achieved this.

- **Main Advantage:** The military destruction of the nuclear project (which would also require a widespread ground maneuver).
- **Main Disadvantage:** A war in which the domestic home front becomes an active battleground due to ballistic missile fire, alongside a significant risk to forces operating in the subsurface domain.

The current situation: The war halted halfway, and therefore failed to achieve its objectives (though it is still too early to assess the probability of a post-war regime collapse). The question of whether to resume the fighting in order to decisively eliminate the nuclear threat rests squarely on President Trump's doorstep.

Renewing the war would carry heavy implications for Israel's global standing, for domestic legitimacy within the United States, and for Israel's civilian home front and economy. However, a military achievement that eradicates the nuclear program and significantly destabilizes the regime would strip Iran of its primary bargaining chips at the negotiating table. If Iran were then to return to negotiations, it would do so from a far weaker position.

Summary and Weighing the Alternatives

The Bad Options:

- **A Bad Nuclear Agreement:** One that fails to resolve the problem, grants legitimacy to the Iranian regime, eases economic pressure, and ensures the regime's survival.
- **Weak, Long-Term Pressure:** A policy that would allow the regime to survive, rebuild its threatening capabilities, and operate without international oversight and control.
- **A Poorly Conceived Strike:** An attack designed solely for symbolic purposes (for example, targeting power stations or bridges), which may inflict pain on Iran, but would neither reduce the nuclear threat nor push Iran toward compromise.

The Good Options:

- **A nuclear agreement** that completely prevents a military nuclear program while permitting a civilian nuclear program on Iranian soil under vulnerable conditions (above ground) and subject to international supervision.
- **Sustained economic pressure** based on a partial and controlled blockade that would increase pressure on the regime to change policy (in other words, to drink the poison chalice). It should be emphasized that this is not an objective in itself, but rather a means toward another strategic end.
- **A targeted operation** aimed at neutralizing the nuclear sites and removing the enriched material from Iran, followed by a rapid transition to negotiations over a permanent agreement, at a moment when Iran is stripped of leverage.

The choice should be guided by a single criterion: improving Israel's national security in a way that will endure beyond the Trump presidency. The likelihood of American backing for another campaign against Iran after the Trump era is low. Therefore, what is required now is either a

good nuclear agreement or a decisive military strike followed by a complementary diplomatic process.

The middle-ground option, "neither strike nor agreement," remains highly relevant as a pressure mechanism, but it must not be allowed to calcify into a long-term strategy.

Conclusion

The war with Iran is not yet over, and it is therefore too early to draw definitive conclusions regarding its success or failure. In the future, the campaign will be judged along two timelines: in the short term—whether the threats facing Israel (the nuclear program, the proxies, and the missile threat) were removed; and in the long term—whether the war altered Iran's policy and in what direction: toward greater radicalism, increased moderation, or regime transformation in a more pragmatic direction.

The policy recommendations are likewise subject to the test of time. If the mutual blockade leads either to compromise or to renewed military confrontation, it will have served a useful purpose; in either scenario, the issues most important to Israel will receive attention. However, if the blockade evolves into a prolonged maximum-pressure strategy without meaningful limits on Iranian force buildup and military capabilities, Iran is likely to restore its capabilities.

Given the new leadership, the trauma of the war, and the growing dominance of the Islamic Revolutionary Guard Corps, the future threat Iran could pose under such conditions would likely be more severe than in the past.

Operational Recommendations

- **Short-term:** Implement the blockade as a pressure mechanism aimed at softening Iran's position in negotiations and building legitimacy for renewed military action should Iran refuse to compromise.
- **Stringent nuclear agreement:** Strive for an agreement that pushes Iran's breakout timeline for nuclear weapons years ahead: permitting above-ground facilities only and ensuring a breakout time of at least one year for fissile material, thereby enabling an effective Israeli strike should Iran initiate a breakout attempt.
- **Resumption of fighting:** If the war resumes, it must be defined as a campaign to eliminate threats, with the nuclear threat designated as the first to be removed. Aerial strikes alone will not be enough to achieve this objective.
- **Human rights:** Even in the event of a nuclear agreement, sanctions related to human rights in Iran must be preserved. Legitimacy should not be granted to the regime's brutal oppression of its own citizens.
- **Working assumption — a covert nuclear project:** The defense establishment will operate under the assumption that a covert nuclear weapons project exists in Iran. Intelligence and operational preparedness for such a scenario must be accelerated. Even if decisive results are achieved (through military strike or agreement), resources that generate this basic readiness must not be spared.

- **Lebanon:** The Iranian proxy strategy must be disrupted through bilateral engagement with Lebanon. Pursuing a peace agreement that would require and verify Hezbollah's disarmament under international supervision, in exchange for an Israeli withdrawal to the international border, would advance this objective.