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SHIFTS IN ISRAEL-IRAN DETERRENCE AND THE RAMIFICATIONS ON REGIONAL SECURITY

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Abstract

This study examines the changes in Israeli-Iranian deterrence strategies following the 12-Day War, which erupted on June 13, 2025, and their impact on regional security. The region was already grappling with numerous security challenges following Operation Al-Aqsa Flood on October 7, 2023, which Israel exploited not only to retaliate against Hamas but also to weaken the Iran-backed “Axis of Resistance.” Israel succeeded in demolishing the Gaza Strip and curbing Hezbollah’s capabilities through a truce that temporarily removed it from the conflict, while the fall of the Assad regime in Syria further bolstered Israel’s dominance. Meanwhile, the Houthis continued their threats against Israel. The Israeli-Iranian confrontation (June 2025) revealed shifts in deterrence strategies, notably a transition from covert, indirect methods to overt, direct engagement, with both sides demonstrating the ability to penetrate each other’s territory and implement deterrence in practice. The study concludes that these shifts in deterrence have inflicted significant damage on regional security, encouraging states to pursue deterrent weapons to safeguard their threatened security. Furthermore, these changes have directly threatened Gulf security, violated Qatar’s national sovereignty and endangered maritime corridors and global energy security.

Keywords: Israel-Iran war, deterrence, regional security, strategic hedging.

Introduction

As the United States and Iran prepared for a sixth round of nuclear talks on June 15, 2025, Israel carried out surprise strikes on Iran on June 13, triggering a 12-day exchange in which Iran hit back to restore a deterrent balance. The backdrop was steadily rising tensions, with an Israeli aim to deliver a decisive blow amid the erosion of Tehran's proxies and allies and Israeli discontent over the trajectory and outcomes of US-Iran nuclear negotiations. After five inconclusive rounds, Israel judged the moment ripe for preemptive attacks to cripple Iran's nuclear infrastructure and impede its regional ambitions. Iran rapidly answered back by striking Israel's core, causing severe losses, prompting direct US intervention against Iranian nuclear sites and the imposition of a ceasefire.

Although the fighting halted after Iran's strike on Al Udeid Air Base, it exposed a reconfigured deterrence equation between Israel and Iran with far-reaching security repercussions. The study probes these strategic shifts and their regional effects through a comparative analytical lens, structuring the inquiry around four topics: the regional security landscape, prewar deterrence features, wartime transformations in deterrence and the ensuing regional implications.

A Sketch of the Pre-war Regional Security Reality

Operation Al-Aqsa Flood

On October 7, 2023, Hamas launched Operation Al-Aqsa Flood, which resulted in the capture of some Israeli settlements for a period of time, the killing of 1,300 people, the wounding of about 3,000 and the capture of 200 people.⁽¹⁾ Israel quickly responded with Operation Iron Swords, invading the Gaza Strip, completely destroying its infrastructure and killing more than 67,000 Palestinians by the beginning of October 2025.⁽²⁾

Several regional actors moved to de-escalate the crisis and halt hostilities. Their efforts initially produced limited, time-bound agreements that enabled small exchanges of detainees and captives on both sides, but all later attempts to secure a broader cessation of fighting failed.⁽³⁾

Operation Al-Aqsa Flood exposed serious vulnerabilities in Israel's deterrent posture. Therefore, in its response, Israel raised the cost of the conflict with Hamas and launched a military campaign that disregarded humanitarian considerations, including cutting off food and fuel to the population.⁽⁴⁾ Israel's goal in its campaign was to impose a siege on the Gaza Strip, displace its people southward toward the Egyptian border and block the entry of aid and supplies. In a later phase, it sought to eliminate Hamas entirely and tighten the blockade after storming Rafah and taking control of the Philadelphi Corridor.⁽⁵⁾

The Israeli military did not simply aim to degrade Hamas' capabilities; it sought to dismantle the broader Iranian-led "Axis of Resistance" and to impose new rules of engagement designed to end, or at least diminish⁽⁶⁾ Iran's regional

reach. It also tried to leverage the war as a chance to reshape the political and security order of the Middle East.⁽⁷⁾

Curbing Hezbollah's Capabilities

In line with Iran's "unity of arenas" strategy, Hezbollah moved to assist Hamas by firing rockets from southern Lebanon into northern Israel, compelling the Israeli government to evacuate those border communities. Israel, in turn, mounted offensive operations that devastated swaths of southern Lebanon up to Beirut's southern suburbs, causing thousands of Lebanese deaths, and targeted senior Hezbollah figures for assassination.⁽⁸⁾

Israel moved beyond a posture of limited engagement and escalated its strikes on Hezbollah and across Lebanon. As a consequence, Hezbollah suffered substantial losses in manpower and key military capabilities, including after the detonation of the group's pagers and disabling of its walkie-talkies. More than 50 fighters were killed.

The Israeli military also assassinated Hezbollah Secretary-General Hassan Nasrallah in an airstrike on Beirut's southern suburbs on September 27, 2024. On October 24, Israel killed Hashem Safieddine, the head of the party's Executive Council and widely viewed as Nasrallah's likely successor. Israeli forces further advanced into Hezbollah strongholds such as Khiam, Shamaa and Bint Jbeil, claiming significant battlefield successes.⁽⁹⁾

Israel refined its approach to force Hezbollah out of the fight, secure a ceasefire and press for the implementation of UN Security Council Resolution 1701 (2006).⁽¹⁰⁾ A truce took effect on November 27, 2024, requiring Hezbollah to redeploy north of the Litani River and Israeli forces to pull back from southern Lebanese villages that they had entered by November 25, 2024.

The terms included the deployment of the Lebanese Army and UN peacekeepers to south of the Litani River to stabilize the ceasefire. As a result, Hezbollah stepped back — perhaps only temporarily — from the conflict equation and suspended its support for Hamas.⁽¹¹⁾

The Fall of Syria's Assad

Separately, the Syrian regime collapsed following an opposition offensive led by Hay'at Tahrir al-Sham beginning on November 27, 2024. The opposition rapidly seized Aleppo, Hama and Homs, entering Damascus on December 8, 2024, and President Bashar al-Assad fled after critical allies could no longer secure his rule.⁽¹²⁾

The collapse of the Syrian regime constitutes a major strategic setback for Iran. Syria had served as a core pillar of Iran's "forward defense doctrine," an anchor in the so-called Shiite Crescent, and a critical node in Tehran's regional corridor. It enabled the projection of influence and the movement of material from Iran to Hezbollah.

The withdrawal of Iranian forces — and with them, Iranian leverage — from Syria has therefore undermined Tehran's deterrent posture. In particular, it has

fractured the Syria-Lebanon axis that underpinned Iran's strategy of depth and indirect deterrence.⁽¹³⁾

Israel recognized the strategic upheaval unfolding in Syria and moved to occupy the emerging vacuum. The first consequence was its declaration that the 1974 disengagement framework had collapsed, followed by the seizure of Mount Hermon in the occupied Golan Heights and control of the adjacent UN-patrolled buffer zone. The area spans roughly 235 square kilometers and extends about 15 kilometers into Syrian territory, where peacekeepers had been deployed.⁽¹⁴⁾

Israel also executed more than 200 missile strikes that severely degraded Syria's military and strategic infrastructure. The country's new President Ahmed al-Sharaa stated that Syria would not enter another war and that its current condition precluded new conflicts. In effect, Syria was removed from the arena of regional contests and alliances.⁽¹⁵⁾

Mounting Houthi Threats

The conflict in Yemen produced a key outcome in 2016: the Houthis consolidated control over the country's western coastline facing the Red Sea and the Bab al-Mandab Strait, a critical global maritime chokepoint. Iran, which views the Houthis as an integral component of its regional axis, has supplied them with advanced missile and drone capabilities. These systems allow long-range strikes and enable persistent threats to commercial shipping in the Red Sea and the Gulf of Aden. Such developments align with Iran's broader strategic objectives and support its management of confrontation with regional and international actors.⁽¹⁶⁾

Following the outbreak of Israel's war in Gaza, the Houthis adopted the "unity of arenas" strategy in solidarity with Hamas. On October 19, 2023, they launched missiles and drones toward Israel's heartland and, for several weeks, continued sporadic, low-impact strikes in the direction of Eilat. By November 2023, the campaign shifted toward maritime disruption, targeting Israeli-linked commercial vessels transiting the Red Sea and ships believed to be carrying aid to Israel.⁽¹⁷⁾

The Houthis progressively widened the geographical scope of their operations. They began by striking vessels transiting the Bab al-Mandab Strait, then mounted attacks to ships in the Red Sea and subsequently to targets in the Gulf of Aden. In March 2024, the group declared plans to broaden targeting further to include ships bound for Israel in the Indian Ocean en route to the Cape of Good Hope.⁽¹⁸⁾

On December 19, 2023, Washington announced a US-led maritime coalition in the Red Sea, commonly referred to as Operation Prosperity Guardian, with the UK and other partners joining to protect commercial navigation and counter Houthi threats. On February 19, 2024, the European Union launched Operation Aspides as a parallel naval mission to safeguard shipping in the Red Sea, deter and disrupt Houthi attacks on vessels and uphold freedom of navigation. The United States also redesignated the Houthi movement as a terrorist organization, signaling a sharpened coercive approach alongside maritime protection efforts.

Houthis stated that any halt to their attacks was contingent on ending Israel's war in Gaza, linking maritime escalation to developments in the war on Gaza.⁽¹⁹⁾

Overview of Pre-war Deterrence Strategies

Prior to their confrontation, both Israel and Iran operated according to defensive strategies and a calculated approach. The features of the deterrence strategies of both sides can be outlined as follows:

Iran's Strategy

For over two decades, Iran's regional deterrence model relied on the concept of forward defense, aiming to expand its strategic depth by building a network of proxies — primarily non-state actors — dubbed the “Axis of Resistance:” Hezbollah in Lebanon, Hamas and Islamic Jihad in Gaza, the Popular Mobilization Forces in Iraq, the Islamic Revolutionary Guard Corps (IRGC) in Syria and the Houthis in Yemen. This is in addition to strategic alliances, such as the one with the Assad regime in Syria. The objective of this model was to keep any military confrontation with Israel and the United States as far away from Iranian territory as possible.⁽²⁰⁾

Prior to Operation Al-Aqsa Flood, Iran sought to bolster its regional influence by deepening ties with the “Axis of Resistance” and employing the so-called “unity of arenas” strategy, under which the axis would collaborate if any member was attacked, with the primary aim of deterring Israel and the United States.

In parallel, Iran adjusted its posture toward the Gulf states and responded to the Chinese-brokered diplomatic initiative to restore relations with Saudi Arabia, viewing this as a way to ease economic pressures and mitigate regional isolation. Thus, Iran's strategy combined two tracks: engagement and diplomacy with Gulf partners, alongside efforts to strengthen power projection, deterrent capacity and forward defense against the United States and Israel.⁽²¹⁾

Faced with the serious deterioration of the “Axis of Resistance,” Iran was compelled to reassess its strategy and redirect its security focus inward, prioritizing the strengthening of national defense capabilities. This revised approach included dispersing key missile and nuclear infrastructure, constructing multilayered air defense systems, developing fortified command-and-control bunkers and enhancing domestic cyber defense capacities. Consequently, Iran's strategic depth contracted from an external buffer to a primarily domestic defensive deterrent.⁽²²⁾

Israel's Strategy

For the past 75 years, Israel's security strategy has rested on a triad deterrence, early warning and decisive defeat (*hachra'a*) — defined as a swift and absolute triumph. In 2015, a fourth principle of defense was added, emphasizing missile defense, the Iron Dome, and the protection of the border fence. However, Operation Al-Aqsa Flood exposed the failure of this strategy: Hamas was not deterred, the early warning system did not anticipate the assault and the campaign against Gaza did not achieve a rapid victory.⁽²³⁾

As such, Israel's security doctrine underwent significant transformations following Operation Al-Aqsa Flood. A fundamental shift occurred in elite threat perceptions, with the attack framed as an existential challenge to the state. Core concepts such as *blitzkrieg* and qualitative superiority were extensively revised, while the army prioritized restoring deterrence and imposing a new reality in Gaza and southern Lebanon through the unrestrained use of force unconstrained by legal or ethical limits. This shift entailed dispensing with sensitivity to Israeli human or economic losses, including a diminished willingness to negotiate for prisoners held by Hamas.⁽²⁴⁾

Accordingly, Israel pursued a new strategy: the proactive engineering of regional security networks. This approach sought to reshape the regional security system through an advanced model centered on controlling security vulnerabilities. It also aimed to assert comprehensive control over the operational environment across the Middle East and to neutralize emerging threats.⁽²⁵⁾

In addition, Israel placed greater emphasis on layered air defenses — the Iron Dome, David's Sling and Arrow-3 (Hetz 3) — providing multi-tier interception against short-range projectiles and advanced ballistic missiles. Attack-drone and cyber capabilities, already core strengths, assumed greater weight and saw wider operational use. Coupled with military coordination with the United States, this posture aims to defend more effectively while simultaneously preempting and dismantling hostile networks.⁽²⁶⁾

Given the balance of power in its favor and amid Iran's inward turn in military doctrine, Israel saw an opportunity to neutralize Tehran's regional influence and to shape security arrangements that preclude the reemergence of an alternative axis. In effect, Israel is working methodically to engineer a new regional order in which it functions as a dominant security node, setting rules of engagement and managing the balance of power across multiple fronts.⁽²⁷⁾

Changes to Deterrence Strategies

The direct confrontation between Israel and Iran began in 2024, with missile exchanges in April and October marking pivotal turning points and a shift in the rules of engagement. Israel's strike on the Iranian consulate building in Syria prompted Iran's first direct military attack on Israel on April 13, 2024, dubbed True Promise. On April 19, Israel reportedly struck an IRGC air base in Isfahan. Iran denied the attack occurred, and Israel did not officially claim responsibility.

Iran also launched hundreds of ballistic missiles at Israeli cities and sites on October 1, 2024, in Operation True Promise 2, framing it as retaliation for the killings of Hezbollah leader Hassan Nasrallah, Hamas Political Bureau Chief Ismail Haniyeh and an IRGC commander. On October 26, 2024, Israel responded with airstrikes against Iran's air defense systems, military facilities and ballistic-missile production sites, though the damage was limited and largely symbolic.⁽²⁸⁾

The most significant shift in Israel's initiative came with its June 13, 2025, attack, codenamed Operation Rising Lion. The operation sought to destroy Iranian

air defenses and missile capabilities, strike multiple air bases, assassinate several IRGC commanders and prominent nuclear scientists.⁽²⁹⁾ It also targeted facilities of Iran's nuclear program — including Natanz, Fordow, Parchin and Arak — as well as ballistic missile manufacturing and launch sites, drone production facilities and other strategic assets.⁽³⁰⁾

For its part, Iran responded with three successive waves of ballistic missiles that directly targeted Israeli infrastructure and caused casualties. The strikes hit strategic urban centers, including Tel Aviv and Haifa, exposing vulnerabilities in Israel's air defenses — particularly the Iron Dome and Arrow systems.⁽³¹⁾ They also inflicted significant damage on the economy, tourism and education sectors, and marked a qualitative shift by demonstrating Iran's capacity to hit strategically valuable targets inside Israel.⁽³²⁾

Thus, it can be said that this war shattered many established rules in Israeli-Iranian conflict strategies, which are discussed below.

Bringing the Confrontation Out Into the Open

The conflict has shifted from covert confrontation to open warfare, moving from proxy battles and third-country arenas to direct clashes. Iran, long reliant on its regional proxy network in its struggle with Israel, has been deprived of key external defenses by recent regional developments, compelling it to respond with direct military operations. What had been a shadow war has thus become an overt confrontation.⁽³³⁾ In essence, deterrence through ambiguity has given way to explicit confrontation.⁽³⁴⁾

Striking the Core

The recent war demonstrated each side's capacity to strike deep within the other's territory. For Israel, it marked the first major confrontation fought not at the periphery but inside its heartland, with attacks reaching major cities and targeting strategic capabilities and sensitive sites. This stands in contrast to prior conflicts largely confined to Gaza, the West Bank, southern Lebanon, Syria and Yemen.⁽³⁵⁾ At the same time, Israeli operations penetrated deep into Iran, hitting elements of its leadership and strategic infrastructure.⁽³⁶⁾ The confrontation also showcased both countries' ability to launch hundreds of missiles and drones against the other's heartland.⁽³⁷⁾

US Unprecedented Support for Israel

The United States extended substantial support to Israel by deepening missile defense cooperation and redeploying key naval assets to deter Iran and its regional allies. This included the deployment of the USS Nimitz carrier strike group to the Arabian Gulf in June 2015. Washington also engaged in a diplomatic ruse against Iran prior to the conflict, maintaining the semblance of preparing for a sixth round of negotiations scheduled to be held in Ankara, even as Israel's military preparations were already progressing in full swing.⁽³⁸⁾ The most consequential form of US support, however, came through direct military intervention: the

delivery of 12 bunker-buster bombs targeting the Fordow nuclear facility, two missiles targeting the Natanz nuclear site and Tomahawk cruise missile strikes on the Isfahan nuclear complex.⁽³⁹⁾

Actual Deterrence

Operation Rising Lion was Israel's attempt to dismantle Iran's strategic infrastructure. In military theory, this pattern is identified as a major opening attack — a tactic employed at the outset of a conflict to break the adversary's will and cripple its ability to coordinate an effective response. The operation, however, failed to fully meet its objectives, as Iran absorbed the initial blows and responded forcefully through a strategy of cost deterrence — making aggression against its territory prohibitively expensive and thereby compelling the opponent to reevaluate its calculations. This dynamic marked a shift toward active deterrence, a doctrine that emphasizes not only the threat but also the deliberate and controlled application of force.⁽⁴⁰⁾

Ending Israel's Monopoly of Taking the Initiative to Strike

The Iranian response signaled the end of Israel's longstanding monopoly on military initiative. It symbolically dismantled the one-sided deterrence equation by demonstrating that a state under attack possesses both the capability and the right to retaliate. What was once an exclusively Israeli prerogative — the ability to initiate offensive action — has now extended to its regional adversary. Through its attacks, Iran confirmed the emergence of a new regional deterrence equation, one that has unsettled the psychological and political foundations of Israeli society, long sustained by the illusion of absolute security.⁽⁴¹⁾

The Role of Technology and Smart Weapons

Technology has assumed a pivotal role in redefining the very notion of military power, increasingly centered on what military studies describe as low-cost smart weapons. These include drones and precision-guided missiles, which constitute a new form of deterrence. In this conflict, Iranian Shahed and Mohajer drones, though far less destructive than fighter aircraft, succeeded in breaching Israeli airspace and striking targets deep within Tel Aviv. This illustrates how military technology has become a decisive instrument in managing contemporary warfare. Through drones and smart missiles, Iran has gained the means to project threat and deterrence without bearing prohibitive material expenses or human casualties.⁽⁴²⁾

Implications for Regional Security

The transformations in the rules of deterrence between Iran and Israel have significantly broadened the scope for further repercussions on the security architecture of the Middle East, as follows:

Initiating a Regional Race for Deterrence

The Israeli attack on Iranian nuclear facilities, which operate under the supervision of the International Atomic Energy Agency (IAEA), constituted a grave turning point in the nuclear non-proliferation regime. The unprecedented nature of such an act — carried out by a state that is not party to the Non-Proliferation Treaty (NPT) — undermined the treaty's legitimacy and potentially compels regional actors to weigh the prospect of developing their own deterrence capabilities,⁽⁴³⁾ particularly in light of the actions of the United States, Israel and Iran. This dynamic deepens the prevailing crisis of trust and heightens the risk of a regional "balance of terror."⁽⁴⁴⁾

Historical precedent indicates that states subjected to preemptive attacks on their nuclear programs often accelerate efforts to develop alternative programs in secrecy, circumventing international oversight. Accordingly, an Israeli strike on Iranian nuclear facilities would likely convince Iran of the futility of relying on international assurances, reinforcing the perception that the possession of nuclear weapons alone can effectively deter future attacks. This may prompt Iran to expedite its approach to crossing the nuclear threshold, with consequences that could reverberate far beyond the Iranian-Israeli confrontation and threaten established regional security arrangements.⁽⁴⁵⁾

Threatening the Security of the Gulf

The Iran-Israel war has exposed the Gulf region to unprecedented security threats. Positioned at the epicenter of regional instability, the Gulf states have responded with cautious pragmatism, adopting a strategy of strategic hedging in their dealings with the belligerents, while consistently affirming their refusal to get involved in the conflict.⁽⁴⁶⁾

Conversely, the US attack on Iranian nuclear facilities intensified the risks facing Gulf security rather than reducing them. The Gulf states denounced the United States' Operation Midnight Hammer to destroy Iranian nuclear sites, characterizing it as a breach of the UN Charter and an affront to the principle of territorial sovereignty. Furthermore, they cautioned against the dangerous precedent such operations could set for the future of Gulf security.⁽⁴⁷⁾

The collapse of the Iranian political system could unleash widespread instability, significantly endangering the security of the strategically crucial, oil-rich Gulf region. The emergence of a failed state on the Gulf's borders would represent a worst-case scenario, further exacerbated by the possibility that any succeeding government might pursue an even more extreme and radical agenda, both internally and across the region.⁽⁴⁸⁾

While Iran maintains cordial ties with Qatar and targeted the Al Udeid Air Base not due to animosity against Qatar but because of the US military presence there, the strikes nonetheless compromised Doha's security. The incident underscored Tehran's readiness to subordinate neighborly relations to its national security imperatives, highlighting its persistent capacity to threaten its neighbors.

This dynamic reveals that Gulf security remains intrinsically fragile whenever it runs counter to Iran's strategic objectives.⁽⁴⁹⁾

Israel is also increasingly viewed as a destabilizing force in the region,⁽⁵⁰⁾ particularly after its attack on Doha targeting Hamas leaders. Consequently, calls have grown within Gulf circles to reconsider relations with Israel, and even to re-evaluate the US security umbrella.⁽⁵¹⁾ Thus, Gulf security faces serious challenges in light of the changing patterns, levels and strategies of confrontation following the Israeli-Iranian conflict.⁽⁵²⁾

Violating National Sovereignty

The Israeli-Iranian war led to violations of the national sovereignty of neighboring countries. Some, like Iran and Qatar, were subjected to direct aggression. Others, including Syria, Lebanon, Iraq and Jordan, experienced violations of their airspace. These violations can be explained as follows:

States Coming Under Attack

Article 2, paragraph 4 of the United Nations Charter requires all member states to refrain in their international relations from threatening or using force against the territorial integrity or political independence of any state. Such actions must not contradict UN principles.⁽⁵³⁾ Given this context, two states were subjected to aggression:

■ **Iran:** The targeting of Iran by the United States and Israel, conducted outside the framework of the Security Council and without justification, constituted a blatant violation of UN General Assembly Resolution 3314. This resolution, adopted on December 14, 1974, defines aggression in international law. The aforesaid US and Israel actions also fall within the broader scope of the crime of aggression. Furthermore, the attacks on nuclear facilities in a sovereign state violated the prohibition on the use of force. They posed a direct threat to Iran's territorial integrity and infringed upon its sovereign right to control and defend its territory.⁽⁵⁴⁾

■ **Qatar:** Doha was subjected to two attacks despite not being a party to the conflict. The first occurred on June 23, 2015, when Iran launched an attack on the Al Udeid Air Base in Qatar. This was in retaliation for the US military operation against its nuclear facilities. While largely symbolic, intended to preserve the Iranian establishment's domestic standing and to signal to the United States that it could threaten US interests in the region,⁽⁵⁵⁾ the main consequence was the violation of Qatari sovereignty.⁽⁵⁶⁾

The second attack took place on September 9, 2015, when Israel struck Doha, targeting members of the Hamas Political Bureau. This delegation had gathered to discuss the US president's ceasefire proposal for Gaza with Israeli counterparts. Israel's strike thus targeted the territory of the mediating state, which had hosted these negotiations for nearly two years. The attack caused multiple deaths

and injuries among civilians, sparked widespread condemnation and represented a serious threat to Qatar's national sovereignty.⁽⁵⁷⁾

Airspace Violation

Israel and Iran violated the airspace of neighboring countries — including Syria, Lebanon, Iraq and Jordan — without consent. These states lacked the defensive capabilities needed to safeguard their national sovereignty against such breaches. Israel extensively used their airspace to intercept Iranian missiles and aircraft, as well as to refuel its own planes mid-flight. Meanwhile, Iran deployed missiles and drones through these airspaces en route to Israel, representing a clear infringement of the principle of full sovereignty over airspace. This also contravenes the principle of neutrality as outlined in the Hague Conventions, which stipulate that a neutral state's territory, including its airspace, must be legally protected from becoming a battlefield.⁽⁵⁸⁾

Threatening Waterways and Global Energy Security

One potential escalation scenario, should the war with Iran continue, is the closure of the Strait of Hormuz to global oil trade. Additionally, the Houthis continue to threaten navigation in the Bab al-Mandab Strait. This scenario and Houthi belligerency seriously risks global energy security. Approximately 35% of the world's seaborne crude oil exports and 20% of its liquefied natural gas exports pass through the Strait of Hormuz. Oil and gas exporters in the Gulf states and Iran rely heavily on this route. Tehran would likely be compelled to close the strait if its leadership faces an existential threat or if damage to its critical production or export infrastructure renders it unable to export oil.⁽⁵⁹⁾

Regarding the Bab al-Mandab Strait, the Houthis have successfully threatened navigation there. Major powers have been unable to deter these threats effectively. As a result, many shipping companies rerouted their vessels around the Cape of Good Hope. This detour adds approximately 2,500 nautical miles and 10 extra days to the journey. Consequently, revenues from the Suez Canal have declined by 40%.⁽⁶⁰⁾

Reshaping Alliances

The Israeli-Iranian conflict has led to a reassessment of regional alliances. Some states are exploring new security arrangements, while others focus on strengthening collective defense partnerships based on a shared perception of threat. Additionally, the emergence of new tools — such as nuclear threats, cyberattacks and drones — is pushing security doctrines beyond traditional frameworks. This shift favors preventative and proactive approaches grounded in a broader, more comprehensive understanding of evolving risks.⁽⁶¹⁾ The map of alliances in the Middle East is being redrawn. Countries are combining strategies of hedging, alignment and mediation to avoid direct involvement in conflicts. Their goal is to maximize security gains while minimizing risks and exposure.⁽⁶²⁾ The Atlantic Council report by Jonathan Panikoff succinctly captures the evolving

regional dynamics by stating that the confrontation has succeeded in imposing new realities. However, it has also created a strategic vacuum. This vacuum necessitates a comprehensive redefinition of alliances and the rules governing interactions in the Middle East.⁽⁶³⁾

Conclusion

The conflict between Israel and Iran did not conclude with the ceasefire, as its root causes persist. The primary reason the fighting stopped was the deterrence achieved by both sides, following heavy losses. Iranian missiles that bypassed the Iron Dome caused unprecedented destruction in Israeli cities. This paralyzed daily life in Israel and heavily impacted the economy, tourism and education sectors. In contrast, Israeli attacks damaged key strategic sites in Iran, including important facilities and the elimination of leaders and scientists. However, Israel failed to meet its objectives: it did not topple the establishment nor dismantle its nuclear program. Furthermore, continuing the war would have imposed an enormous economic burden that Israel was unwilling to bear. Iran, meanwhile, recognized that prolonging the conflict would likely cost the Iranian ruling system its survival, as it could not endure a full-scale war against the United States.

The 12-Day War prompted shifts in the deterrence strategies of both Israel and Iran. These shifts included a move toward direct and open confrontation and an enhanced ability to penetrate deep into enemy territory. This broke Israel's long-standing monopoly on initiative and deterrence. Both sides also increasingly employed precision weapons to achieve objectives without engaging in direct conflict. Additionally, Israel received unprecedented support from the United States. These shifts have led to significant consequences for regional security. They have fueled a regional arms race, heightened threats to Gulf security and resulted in violations of national sovereignty. The security of strategic waterways and global energy supplies has been jeopardized, while discussions about the future restructuring of alliances have intensified.

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