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# Flash Executive Summary Report



Bottom line, the strategic risk of broader conflict in the Middle East is increasing following the rocket and drone attack on Israel by Iran, its proxies, and partners. This “Flash ExSum” highlights recent events and implications.

## Key Points:

- Last Saturday night, Iran, supported by Houthis in Yemen, Kateb Hezbollah (KH) in Iraq, and Lebanese Hezbollah (LH) in Lebanon, fired more than 300 drones and missiles at Israel. Iran is claiming victory to its domestic audience for having conducted a mass attack on Israel, avenging Israel’s 1 April strike in Damascus that killed several senior Islamic Revolutionary Guard Corps (IRGC) officers. However, Iran very much wants to stop the escalation and avoid a wider war.
- Estimates are that 40-50% of the munitions failed in flight. Israel supported by the U.S., UK, and France, intercepted more than 90% of the remaining Iranian munitions. Only 5-10 missiles struck Israel’s air base supporting the new advanced F-35s, however no planes were damaged. This is a tremendous accomplishment for Israel, who could reasonably declare also victory and cease the escalation – a move that is clearly favored by Washington. However, Israel’s domestic audience is outraged and demanding a response.
- The focus of the international community has shifted from condemnation of Israel for the humanitarian crisis in Gaza to supporting Israel in its conflict with Iran. A similar phenomenon happened internal to Israel. Almost overnight, domestic criticism of the Prime Minister for the failures in the conflict with Hamas have decreased significantly and been replaced with outrage over Iran’s attack.
- The Middle East is at a dangerous point. Escalation and wider regional war are increasingly possible as we climb higher up the escalation ladder.
- A massive response by Israel could trigger Iran to pressure LH, KH, and most dangerously, entities in the West Bank to embark on a wider regional war. If that happens, Israel will need international support, namely from the United States. Over the weekend an unnamed White House Official stated that the current position is that the U.S. will not support Israel in a follow-on offensive strike against Iran. Facing defeat in a wider regional war, Israel could resort to employing its full range of conventional and nonconventional capabilities to end a war with Iran.

## Discussion:

Iran for two decades has operated below the level of direct armed conflict against Israel and the U.S. to destroy Israel and drive the U.S. from the Middle East. Iran has operated this way because it is militarily inferior to Israel and the United States. In a wider war, Iran stands to lose its strategic missile capability, its nascent nuclear capability, and the network of partners and proxies that took it decades to build. Saturday night, Iran crossed the threshold from “below the level” of direct armed conflict to “direct or head-to-head armed conflict.”



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Iran was under tremendous internal pressure to respond to Israel's 1 April strike in Damascus that killed several senior IRGC officers. Now that it has conducted the strike, Iran hopes to control, or to end the escalation cycle.

For a number of reasons, Iran believes this is possible. First, it broadcast widely that the attack was coming allowing Israel and its partners to prepare defenses. Iran subsequently publicly announced their operations had concluded. Second, a large percentage of munitions (reportedly upwards of 40-50%) never reached Israel; a Politico article argues that Iran may have purposely used older, less reliable weapons to lessen the effects on Israel, but this is not known for certain. Third, fewer than ten missiles reached a single airbase from which Israel's advanced F-35s operate, and no planes were damaged. Finally, Iran is playing to the international community's fear of a larger war. It is threatening an even larger strike should Israel respond to Saturday's attack with a counter strike of its own inside Iran's borders. Iran's hope is that with the minimal damage caused by its strike and its threat of a wider war, Israel will cease the escalation.

Israel has also been operating below the level of direct armed conflict against Iran. For years, it struck Iranian targets in Iraq and Syria, rarely acknowledging the strikes. Allegedly, Israel has also conducted covert operations inside Iran, never taking credit. Israel has never conducted a large-scale military operation inside of Iran.

Israel's defense against Iran's attack was a tremendous accomplishment. The international community is urging Israel to show restraint and questioning how reasonable a massive Israeli response is given the minimal effectiveness of Iran's strike. That said, Israelis are enraged and are demanding action. Senior government officials have made public statements suggesting Israel will respond.

## Implications:

First, regarding what is commonly called "controlling" escalation between two adversaries, in this case, Israel and Iran, neither side can actually "control" escalation of the other. Each nation can and will attempt to influence decision-making on the other by threatening unacceptable costs and/or by denying benefits of adversary escalation, but it is the leadership of each nation that will determine whether they believe it is in their best interests to escalate deeper into a conflict and/or to increase the level of violence.

There are two possible and very troubling escalation scenarios. The first is that Israel strikes Iran, triggering a wider war that could include a massive missile response by Iran and its proxies and partners, combined with a ground war involving LH and West Bank Palestinian forces. If Israel faces defeat, the chances that the U.S. will be pulled into the war increases. The second is a scenario where Israel faces defeat and resorts to the use of nonconventional capabilities to end the war. In this situation, international support for Israel will likely turn to international condemnation followed by years of repercussions which could have both national security and economic risks for a country already diverting resources to the current war effort.

Escalation will benefit the embattled Israeli Prime Minister. The Israeli government has been under tremendous international pressure over the growing humanitarian crisis in Gaza. Domestically, the government is under continued pressure for the failures associated with the conflict with Hamas. Both pressures have dissipated considerably and international and Israel domestic outrage has been redirected to Iran's attack.

Perhaps Israel's War Cabinet can find a method of retaliation against Iran that somewhat assuages Israelis' demand for action without alienating the United States. This method should also avoid triggering additional escalation by Iran, and its proxies, and partners. This will be tricky, as public statements from the leaders of Israel and Iran lean towards a showdown. Prime Minister Benjamin Netanyahu recently stated on a video "whoever harms us, we will harm them." Similarly, Iranian President Ebrahim Raisi said "The smallest action against Iran's interests will definitely be met with a severe, extensive and painful response against all its perpetrators."

The Israelis must also consider with this first-ever direct attack on Israel from Iranian territory, that Iran may have crossed a threshold that it could return to in the future if not deterred from doing so. In other words, the Iranians could feel free to do such attacks again the next time Israel attacks a significant target in Syria or elsewhere. Without question, Israel's War Cabinet will seek to restore deterrence to prevent future direct attacks from Iran, and this will be factored into their response.

Finally, Russia benefits from this conflict as it distracts the powerful nations that are supporting Ukraine. Ukraine clearly is harmed by the conflict. The Strait of Hormuz will certainly be impacted if the Iran-Israel conflict expands to a wider regional war. As it is constricted by the conflict, global oil prices will rise – of course, Russia will benefit from higher global oil prices.

China continues to be reliant on Iranian oil as well as resources from other Gulf states. While China would benefit from the U.S. being pulled into another Middle East conflict, the impact to the free flow of commerce to and from China is not attractive.

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