



JULY 2024

Israel against Iran: regional conflict scenarios in 2024

Four scenarios capture the main dynamics of conflict between Israel and the US on the one hand, and Iran and the axis of resistance on the other. They are: 'a fight for the status quo', 'shifting red lines', 'limited war' and 'total war'. The first two scenarios amount to muddling through under the permanent threat of escalation, which could happen due to unintended yet possibly catastrophic incidents. The more warlike scenarios signify a shift to high-intensity war across large parts, or all, of the region. As 7 October 2023 created tighter linkages between the Israeli occupation of the Palestinian territories and the regional conflict between Israel/US and Iran, the violent dynamics of either issue can trigger each scenario. Meanwhile, scenario pathways lie so close to each other that tipping points can swiftly transform one scenario into another. Together, the scenarios point to the need to develop conflict prevention measures between Israel, the US and Iran – such as hotlines, protocols that spell out red lines and tolerable action/reaction bandwidths or even demilitarised zones – between now and the US presidential elections in November. The core strategic objectives of the conflict parties suggest that progress is possible. Israel seeks to restore the security of its northern border without an all-out war against Hezbollah or Iran. It also intends to continue occupation. It does not care enough about normalisation with Saudi Arabia to discontinue annexation, which means it will not alter the regional security order to an extent that could truly threaten Iran. Tehran, in turn, seeks good relations with the Persian Gulf states, recognition as a regional power and the isolation of Israel. The US wishes to uphold Israel's security by reducing the risk of Hamas, Hezbollah and Iran, but without triggering a region-wide, high-intensity conflict. A precarious balance might be achieved, for example if Israel halts the in-your-face elements of its expanding occupation, a reinforced UN Interim Force in Lebanon (UNIFIL) takes up position on both sides of the Israeli-Lebanese border, US sanction enforcement against Iran is somewhat loosened and the axis of resistance, including Iran, observes a longer-term ceasefire regarding Israel.

Introduction

The rapid succession of Israel's air strike on Iran's consulate in Damascus (1 April 2024), hundreds of Iranian drones and missiles being fired on Israel (13–14 April) and Israel taking out an air defence radar in Esfahan (19 April) suddenly

brought the oft-invoked spectre of high intensity regional conflict between Israel/the US and Iran/the axis of resistance far too close for comfort. If it had not been for US pressure and mediation, Iran's early signalling of its response, and

Israeli restraint in its counterstrike, war might have erupted through a series of ratchet-style escalatory moves akin to those in August 1914 that led to World War I.¹ Instead, it was a near miss. But, because low-intensity regional conflict between the same parties continues unabated, the risk of future escalation remains substantial. Talk of war between Israel and Hezbollah reached fever pitch in some Israeli political circles in June 2024, for example.²

Against this background, the brief analyses four possible scenarios for regional conflict between Israel/US and Iran/the axis of resistance in the next 12 months.³ This aims to support EU, NATO and Dutch officials to consider and take measures that can help de-escalate regional conflict. The brief also lays a foundation for work that can help mitigate threats to the Netherlands that can arise under different scenarios.⁴ It starts by situating the Hamas attack on Israel of 7 October in the context of two pre-existing conflicts: on the one hand, the enduring Israeli occupation of the Palestinian Territories and resistance against it; on the other hand, the Israeli/American-Iranian conflict. Such analysis is warranted because 7 October deepened both conflicts and also linked them to a greater extent. Next, the brief discusses four possible scenarios for regional conflict between Israel/the US and Iran/the axis of resistance, including relevant

scenario pathways and tipping points.⁵ The brief concludes with reflections on the impact of different scenarios across the region and on the strategic interests of the main protagonists.

Situating 7 October 2023

The 7 October 2023 Hamas attack on Israel sits in a long series of violent exchanges between various Palestinian armed resistance groups and Israeli occupation forces that can be traced back to the Israeli conquest of the Golan, Sinai, West Bank, Gaza and East Jerusalem during the Six-Day War of 1967. While Israel returned the Sinai to Egypt as part of its peace treaty with Cairo in 1979, which included the withdrawal of several thousand Israeli settlers, the other territories remain occupied by Israel. Over time, they have been gradually settled and are *de facto* annexed by means of structural forms of coercion and violence. This has triggered armed Palestinian resistance, in particular by the Palestine Liberation Organization (PLO) and Hamas. While the Oslo agreements halted fighting between Israel and the PLO in 1993–1995, Hamas continued to fight.⁶ Although the Oslo agreements were meant to create an independent Palestinian state, for all practical intents and purposes they instead deepened Israeli occupation.⁷ Fatah, the PLO's dominant faction, has turned into an auxiliary occupation force tasked with basic administrative and

1 Tuchman, Barbara Wertheim. 1994. *The Guns of August*. 1st Ballantine Books ed. New York: Ballantine.

2 Harel, Amos. 2024. 'Fear of a Full-Blown Conflict in Lebanon Looms, with Members of Israel's Government Stoking It'. *Haaretz*, 1 July 2024, sec. Israel News. <https://www.haaretz.com/israel-news/2024-07-01/ty-article/premium/despite-risks-big-war-in-north-beckons-govt/00000190-6aad-d01f-abbe-7fad4b790000>.

3 I am grateful to Hamidreza Azizi, Eyad Alrefai and Salim Çevik for their contribution to this brief by sharing Iranian, Saudi and Turkish perspectives on regional conflict dynamics. Naturally, the brief's contents remain the responsibility of the authors.

4 The impact of different scenarios on the Netherlands will be examined in a separate study.

5 The purpose of scenarios is to imagine different futures under conditions of uncertainty in order to develop a better understanding of the pathways that lead to any of these futures. In turn, such understanding enables contingency plans to be put in place that can be activated if specific pathway markers occur. Scenarios represent futures that are realistic and possible, but not inevitable. Van der Heijden, Kees. 2005. *Scenarios: The Art of Strategic Conversation*. 2nd ed. Chichester, West Sussex; John Wiley & Sons; Schwartz, Peter. 1996. *The Art of the Long View: Paths to Strategic Insight for Yourself and Your Company*. First Crown Business Edition. New York: Crown Business.

6 For instance: Morris, Benny. 2001. *Righteous Victims: A History of the Zionist-Arab Conflict, 1881–2001*. 1. Vintage Books ed. New York, NY: Vintage Books.

7 Said, Edward W. 2001. *The End of the Peace Process: Oslo and After*. 1. Vintage Books ed. Current Affairs Middle Eastern Studies. New York, NY: Vintage Books.

security duties. Hamas has continued its resistance against Israel. Since 2007, when its victory in the Palestinian elections was denied by Israel, the US, key European countries and Fatah, it has done so from Gaza.

However, the events of 7 October also engaged the Iran-linked 'axis of resistance' due to the scale, duration and ferocity of Israel's military response against Hamas and Gaza.⁸ From an Iranian perspective, the axis originally served as a forward defence mechanism to deter a direct Israeli or US attack against Iran itself in the face of deep US hostility since the Islamic revolution of 1979, the Iran-Iraq war (1980–1988), the US invasion of both Afghanistan (2001) and Iraq (2003), and the risks inherent in Tehran's controversial nuclear programme. Once created, however, the axis also became a tool by which Iran could project power by asymmetric means in support of its regional policies. Iran's expansion into Syria after 2011, particularly, suggests that the axis acquired offensive as well as defensive functions. From the perspective of its participating groups – such as Hezbollah, Ansar Allah, Asa'ib Ahl al-Haq, the Fatemiyoun Brigade, Hamas and Palestinian Islamic Jihad – the axis embodies a transnational order of sorts and serves as a vehicle to pursue shared interests.⁹

Hamas' attack on 7 October 2023 tightened linkages between the enduring occupation of Palestine and the regional standoff between Israel, the US and Iran because it demonstrated how Iranian military advice and support for Hamas and Palestinian Islamic Jihad, in large

part via Hezbollah, had helped turn Hamas into a serious threat. Moreover, for the first time in its existence, the axis as a whole became involved in the Palestinian issue in response to the Israeli military campaign in Gaza. Israel's risk from Hezbollah has loomed larger since it is much better prepared, positioned and armed than Hamas. While Tehran appears to have had neither foreknowledge nor involvement in the 7 October attack, it nonetheless applauded Hamas' 'heroic resistance' from the sidelines. However, it did not come riding to the rescue when Israeli forces destroyed Gaza and it is this simple fact that makes it pertinent to observe that Gaza is nested in the broader regional conflict rather than the other way round. It was not for lack of trying as Hamas played two gambits with its attack. To begin with, it meant to raise the cost of occupation in Israeli blood, expenditure and international censure so that the Palestinian issue would not be buried any deeper under the mantra of the two-state solution and the Abraham accords.¹⁰ But Hamas also sought to expand the conflict across the region and mobilise the latter against Israel.¹¹ It succeeded in its first objective, but so far has only achieved limited success regarding its second. This is mostly because Iran is not interested in a high-intensity regional conflict.

Conflict scenarios between Israel, the US and Iran

The nature and risks of future regional conflict between Israel and the US on the one hand, and Iran and the axis of resistance on the other, can be made more understandable by means of four interlinked scenarios. The boundaries between the scenarios are dotted rather than solid lines, meaning that single events can tip one scenario into the next. In other words, the pathways

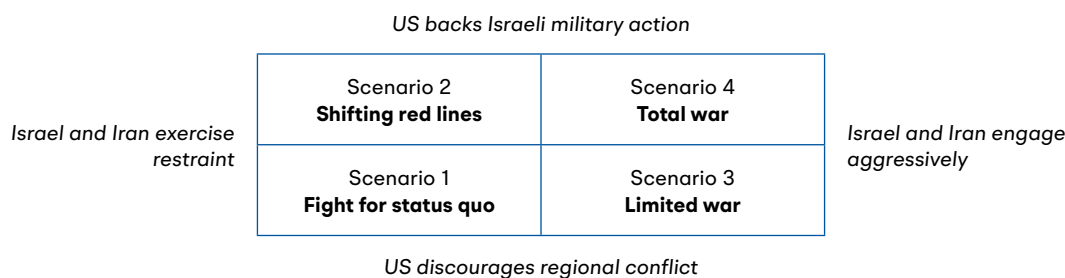
8 The axis of resistance is an Iran-oriented network of armed groups, political parties and social movements that is united by a mix of religious (mostly Iranian Shi'a doctrine), material (national power and influence) and anti-colonial/imperial (anti-US and anti-Israel) interests. See: Ezzeddine, Nancy and Hamidreza Azizi. 2022. 'Iran's Increasingly Decentralized Axis of Resistance'. *War on the Rocks* (blog). 14 July 2022. <https://warontherocks.com/2022/07/irans-increasingly-decentralized-axis-of-resistance/>

9 *Ibid*; Badawi, Tamer. 2024. 'Inside Story: How Yemen's Houthis Dig for Strategic Depth in Iraq'. *Amwaj.Media* (blog). 18 June 2024. <https://amwaj.media/article/inside-story-how-yemen-s-houthis-dig-for-strategic-depth-in-iraq>

10 The normalisation of relations between Israel and the UAE initially focused on restoring diplomatic ties but expanded rapidly into trade and tourism, as well as involving other countries: Bahrain, Morocco and Sudan.

11 Consider Abu Obaida's speech of 9 October 2023 before the Israeli military campaign in Gaza got underway (he is the spokesperson for the Al-Qassam Brigades): <https://www.aljazeera.net/news/2023/10/9/جماس-تهديد-بإعدام-أسير-إسرائيلي-مقابل> (as of 8min:56sec).

Figure 1 Scenarios for regional conflict – Israel/US vs. Iran/axis



leading to the different scenarios have much in common, which in turn is the result of the enmity and confrontation that has accumulated between the conflict parties over past decades. For example, the attack by the ‘Islamic Resistance in Iraq’, which consists of several Iraqi armed Shi’a groups with strong ties to Iran, on the Tower 22 US base in northeast Jordan, which killed three US service(wo)men due to an unexpected air defence failure, could have been a tipping point between scenarios if the US had not reacted with restraint. The same goes for the exchange of missiles and drones between Israel and Iran in April. Despite such proximity, outlining individual scenarios and their pathways helps to understand what risks can result from each, and what preventive actions can be taken. Applying a deductive approach to the many existing analyses of regional conflict between Israel, the US and Iran allows identification of two driving forces:

- the extent to which the US either encourages and supports Israeli military action against Iran or discourages Israeli and Iranian military action
- the extent to which Israel and Iran themselves engage in either aggressive military action against one another or observe restraint.

These driving forces reflect two dominant realities of regional conflict risks. First, the fact that, although the US and Israel are solid allies, US support for Israeli offensive military action against Iran is not a given but will depend on both US domestic factors (e.g. elections, foreign policy outlook, worldview of the president) and regional contextual factors (e.g. whether Iran engages in offensive action, behaviour of Israel itself). Second, even though the military might of the US can be a decisive factor in a regional

conflict in terms of outcomes, Israel’s and Iran’s military actions are its primary drivers. The US can amplify or dampen these. Combining these driving forces generates the following four scenarios:¹²

Scenario 1 ‘fight for the status quo’. This scenario, in which all three conflict parties exercise restraint, reflects the reality before 7 October 2023, as well as the period after the Iranian-Israeli exchange of missiles from April to early June 2024.¹³ As it is likely to recur, it is both a reflection of past events and a forward looking scenario. The pathway leading to this scenario was initiated after the outbreak of the Syrian civil war in 2011. Iran started to assist Bashar al-Assad’s regime through a succession of military aid modalities, including: the creation of Syrian popular defence forces based on the Basij model (a kind of people’s militia); intervention by Hezbollah; transnational mobilisation of armed Shi’a groups; and the deployment of advisers of

12 The scenario titles, headlines and core dynamics are derived from: Van Veen, Erwin and Hamidreza Azizi. 2024. ‘Playing with Fire: Patterns of Iranian-Israeli Military Confrontation’. *War on the Rocks* (blog). 25 June 2024. <https://warontherocks.com/2024/06/playing-with-fire-patterns-of-iranian-israeli-military-confrontation/>.

13 The killing of an Iranian military adviser on 3 June by an Israeli airstrike did not shift this scenario into ‘shifting red lines’ or ‘limited war’ since the adviser does not seem to have been specifically targeted. Also, in the past Iran used to absorb such losses as ‘collateral damage’ of its overall presence in Syria. See: Associated Press. 2024. ‘Israeli Airstrikes near Syria’s Aleppo Kill Several, Including an Iranian Adviser, Reports Say’. AP News, 3 June 2024, sec. World News. <https://apnews.com/article/syria-israel-aleppo-strike-4bb542ab0a1f1764b8d5d1bac478ce49>.

the Islamic Revolutionary Guard Corps (IRGC).¹⁴ After 2015, when the tide of the civil war had turned in Assad's favour, he was beholden to Iran and Russia. Since then, Tehran's aim has been to strengthen its overall military and socio-political position in Syria in addition to keeping Assad in power and maintaining its supply line to Hezbollah. Note that Iran plays a long game here given that Syria's histories of governance and the structure of its security sector are more centralised than those in Lebanon or Iraq. This provides Tehran with a narrower range of options to build relatively autonomous coercive capabilities.¹⁵ In response to Iranian expansion, Israel has continuously sought to degrade Iran-linked military infrastructure through frequent aerial attacks on supply depots, training and staging facilities, and arms convoys. The poor state of Syria's air defences, the minimal air defences of Iran-linked groups and the tolerance that Russian air defences (stationed in northwest Syria) have shown to Israeli incursions of Syria's airspace have created a permissive environment for this approach. These factors have produced a 'whack a mole' pattern, in which Iran continues to expand its position, absorbing losses due to airstrikes, while Israel keeps 'going at it'. Before 7 October, Israel did not target senior Iranian officers directly and in general Iran refrained from retaliation against Israeli airstrikes. If it struck back, Tehran did so in Iraq against well-defended US bases via armed groups it was linked to, largely symbolically.

In brief, this scenario amounts to indirect Iranian-Israeli military confrontation in the form of low-key strikes in a clearly delineated

area – mostly in Syria, some in Lebanon and Iraq – on a limited range of targets. By calling this 'the campaign between wars', Israeli military planners have succinctly captured what they see as the stakes of these dynamics.¹⁶ Factors that restrain escalation in this scenario include protests in both Iran (against curbs on civil liberties, rising corruption and mounting economic duress) and in Israel (against judicial reforms, Netanyahu's conduct of the war in relation to the Israeli hostages, and the ultraorthodox draft controversy). Factors that can tip this scenario into 'shifting red lines or even 'limited war' include attacks that inadvertently produce high levels of sensitive casualties (e.g. US soldiers, Israeli civilians or internationals).

Scenario 2 'shifting red lines'. This scenario, in which Israel and Iran continue to exercise restraint but the US nevertheless backs Israeli military action, characterised the period between 8 October 2023 and 1 April 2024. It recurred in June 2024, when Israel and Hezbollah upped the ante to secure advantages in behind-the-scenes-negotiations. Recent tit-for-tat strikes on senior Hezbollah commanders and the movement's extensive retaliation are part of this dangerous game of brinkmanship.¹⁷ The pattern of interaction is likely to recur in the near future, hence this scenario is both a reflection of past events and forward looking at the same time. The pathway to this scenario since 7 October has consisted of the successive activation of elements of the axis of resistance in response to Israel's military campaign in Gaza. After

14 Ahmadian, Hassan, and Payam Mohseni. 2019. 'Iran's Syria Strategy: The Evolution of Deterrence'. *International Affairs* 95 (2): 341–64. <https://doi.org/10.1093/ia/iyy271>.

15 For example, establishing a Hezbollah-style front aimed at the Golan heights is difficult due to the absence of large, Iran-linked Syrian armed groups that can operate autonomously and yet benefit from a veneer of legality, and also because of reluctance on the part of Assad. See: Tamimi, Aymenn Jawad al-. 2024. 'No "One Size Fits All": Iranian Influence Building in Syria'. *Middle East Quarterly* 31 (3); Veen, Erwin van. 2024. *Armed Organisations and Political Elites in Civil Wars: Pathways to Power in Syria and Iraq*. Routledge Studies in Civil Wars and Intra-State Conflict. Abingdon, Oxon ; New York, NY: Routledge.

16 Shelah, Ofer and Carmit Valensi. 2023. 'The Campaign between Wars at a Crossroads'. Memorandum 227. Tel Aviv: INSS.

17 Al Jazeera. 2024. 'Hezbollah Fires 200 Rockets at Israel after Senior Commander Killed'. Al Jazeera, 12 June 2024, sec. Israel-Palestine conflict. <https://www.aljazeera.com/news/2024/6/12/hezbollah-rains-rockets-on-israel-after-senior-commander-killed>; Harel, Amos. 2024. 'Without Israel-Hamas Deal, Gaza Fighting Will Aimlessly Drag on, and the North Could Plunge into Full-Scale War.' *Haaretz*, 12 June 2024, sec. Israel News. <https://www.haaretz.com/israel-news/2024-06-12/ty-article/premium/without-israel-hamas-deal-gaza-fighting-will-drag-on-as-north-may-plunge-into-all-out-war/00000190-0d69-d0f9-a1d5-dd6940190000>.

7 October, Hezbollah was the first element of the axis to act. Cross-border strikes between Israel and Hezbollah multiplied and departed from existing red lines. For example, in the course of a few months, strikes expanded to 20–30 kilometres beyond the border instead of the usual couple of kilometres. Strikes also started to cause more collateral damage to civilian structures and populations, albeit without civilians yet becoming direct targets. Consider, for instance, the agricultural impact of Israel's use of phosphorus munitions in southern Lebanon. After Hezbollah's cross-border attacks, Houthi attacks on Red Sea maritime shipping and the Israeli port of Eilat (in which they were later joined by Iraqi armed groups) imposed additional (economic) costs on Israel while also globalising the conflict. Such actions enabled the Houthi movement to claim that they are the only Arab actor, other than Hamas, truly standing up for the Palestinians. At around the same time, i.e. the winter of 2023, Syria and Iraq became sites of asymmetric tit-for-tat attacks consisting of air strikes by Israel in Syria, US air strikes in Iraq, and rocket/drone attacks on US bases by the Islamic Resistance of Iraq, i.e. Iran-linked armed groups. In this scenario, Iran's objective is to wear Israel down, whereas for Israel the objective is to stop attacks from several directions by retaliating harder and faster, where possible. Israel finds itself in a multifront conflict in this scenario, taking limited damage from three sides – the Houthi in the south (most intense), Hezbollah in the north (most dangerous) and Iran-linked elements in Syria in the east (most unpredictable), while Iran sits on the fence. By pushing red lines and then de-escalating or temporising as need be, both Iran and Israel play harder for competitive advantage in this scenario. Yet, for a brief period, Israel's effort to impose direct costs on Iran and draw it from the sidelines via its attack on the Iranian consulate in Damascus tipped this scenario into 'limited war' (scenario 3).

Today, this 'shifting red lines' scenario applies to the confrontation between Israel and Hezbollah, which risks escalating into a scenario of 'limited war', or even 'total war', should a full-scale Israeli ground offensive occur. Additional factors that restrain escalation in this scenario include: Israel having so far failed to conceive of a 'day-after'

plan for Gaza (which means it will remain mired in a low-level insurgency and humanitarian catastrophe); wear and tear among the Israeli Defense Forces; Hezbollah not wanting a full-scale confrontation; Lebanon's desperate economic situation; and approaching US elections. Additional factors that can tip this scenario into 'limited war' or even 'total war' include pressure from the extremist elements of the Israeli government and the US that view Hezbollah in the same light as Hamas, i.e. an actor that is preferably eliminated sooner rather than later.

Scenario 3 'limited war'. This scenario, in which Israel and Iran no longer exercise restraint but the US continues to, arises out of either scenario 1 in the form of a critical event or scenario 2, when one of the parties pushes a red line with difficult to de-escalate consequences. In the short period of limited war that the world witnessed between 1 and 19 April 2024, the escalatory pathway consisted of an Israeli attack on Iranian soil (its Damascus consulate), which also killed several senior Islamic Revolutionary Guards Corps (IRGC) officers, compounding earlier targeted Israeli killings of other IRGC officers. In other words, just as Iran had absorbed the killing of IRGC brigadier Razi Mousavi (a senior commander in Syria) in December 2023 and of IRGC general Sadegh Omidzadeh (a senior intelligence officer in Syria) in January 2024, Israel killed IRGC general Mohammed Zahedi (commander for Syria and Lebanon), general Hossein Aminullah (chief of staff for Syria and Lebanon) and major-general Mohammed Hadi Haj Rahimi (commander for Palestine) on 1 April 2024 in Damascus. The version of limited war on display was, however, restrained in nature since Iran gave advance warning of its drone and missile volley. This allowed the US and other allies to enhance Israel's missile defences and intercept most incoming projectiles.¹⁸ Israel responded with a limited strike, which demonstrated high-grade intelligence and precision targeting capabilities.

18 The rate of interception is subject to debate, with some estimates closer to 70 per cent and others closer to 90 per cent.

There are, however, several other pathways that can lead to limited war. First, Israel could use any larger targeted attack on Israeli civilians by Iran-linked elements as a reason to strike back directly. Second, Israeli settlers could engage in violence or acts of sacrilege on the Al-Aqsa compound, which might not only force Iran to react but could also set governments across the Islamic world more firmly against Israel. Third, an increase in the level of violence on the West Bank, whether instigated by settlers, the Israeli military or Palestinian resistance, could trigger greater Israeli military repression as well as, indirectly, more unrest in Jordan. In extremis, this could even overthrow the government in Amman due to the close ties between Palestinians living on the West Bank and large parts of Jordan's population. It could also bring Hamas or Iran into the fray, in turn causing Israel to retaliate. Fourth, implosion of the Palestinian Authority would force the Israeli Defense Forces to establish full military control over the West Bank, which is almost certain to trigger violent responses by Hamas and other resistance factions, spill over into Jordan and, most likely, bring Iran into the fray. Fifth, a frontal Israeli assault on Hezbollah in southern Lebanon could develop into a 'limited war' scenario.¹⁹

Such a 'limited war' scenario consists of a 'short duration-high-intensity' direct conflict between Iran and Israel. However, geography means that they cannot sustain a long-term direct confrontation by themselves. Their capitals are 2,000 kilometres apart. Should it come to this, however, Iran can more easily mobilise the different elements of its axis of resistance than Israel can enlist its partners in the region (such as

the UAE, Azerbaijan or the parts of the Kurdistan Region of Iraq held by the Kurdistan Democratic Party (KDP)). Additional factors that restrain escalation in this scenario include: the deterrent effect of the level of preparedness; arsenal size and Iranian support for Hezbollah that can impose high costs on Israel; ongoing international mediation between Israel and Hezbollah; and a history of unsuccessful Israeli invasions of Lebanon. Additional factors that could bring this scenario about include: continuation of the pro-settler policies of the Israeli government (e.g. arming them, maintaining impunity, legalising outposts); ultranationalist extremist elements in Israel (like Tsav 9) taking events such as 'Jerusalem flag day' to a more harmful level at the Al-Aqsa compound; or even Arab regimes continuing to do business as usual with Israel despite the plight of Gaza, triggering greater popular resistance at home.²⁰

Scenario 4 'total war'. In this scenario, none of the conflict parties continues to exercise restraint. It can only arise if the US intervenes militarily in support or on behalf of Israel. In other words, any shift from a low- to a high-intensity conflict between Iran and Israel that is both direct and sustained depends on US involvement. The pathway towards such a scenario would have to include either direct and large-scale aggressive Iranian acts against Israel that are relatively unprovoked, or an overt declaration by Iran that it is seeking nuclear arms. Even if such a 'casus belli' were present, there are still restraints on US involvement. One such factor will last until the November US Presidential

19 Note that an Israeli ground offensive does not need to lead to a 'limited war' scenario immediately. Iran is likely to wait and see whether Hezbollah can weather such an offensive on its own, for example only deploying senior Iran military commanders to Hezbollah war rooms. In time, and as the state of the battlefield warrants, they could be supplemented with Quds force units, additional attacks from Syria and even direct attacks from Iran. See also: Alfoneh, Ali. 2024. 'Under the Shadow of the War: Israel and Hezbollah'. *Arab Gulf States Institute in Washington* (blog). 17 June 2024. <https://agsiw.org/under-the-shadow-of-the-war-israel-and-hezbollah/>.

20 A recent poll by the Arab Center for Research and Policy Studies illustrates the profound impact of Gaza across much of the Arab world. 67 per cent of its Arab respondents consider 7 October as a legitimate act of resistance; 69 per cent express solidarity with the Palestinians and support for Hamas; 92 per cent express solidarity with the Palestinians; 89 per cent reject recognition of the state of Israel (68% in Saudi Arabia). However, 'only' 36% felt that relations with Israel should be suspended immediately. See: Arab Centre for Research and Policy Studies. 2024. 'Arab Public Opinion about the Israeli War on Gaza'. Doha: Arab Center for Research and Policy Studies. <https://www.dohainstitute.org/en/Lists/ACRPS-PDFDocumentLibrary/arab-opinion-war-on-gaza-full-report-en.pdf>.

elections and takes the form of President Biden's unconditional support for Israel against Hamas and the Palestinians, which does not necessarily extend to Iran or include a regional war. Other restraints on the US are more permanent in nature and consist of the competitive threat of China and the war in Ukraine. It is doubtful that the US has the diplomatic and military capability, or the political will, to engage and prevail on three fronts simultaneously. Moreover, the US public has arguably had enough of wars in the Middle East after the experiences in Iraq and Afghanistan. A wildcard in pathways towards this scenario is the re-election of Trump as president. Even though he is the architect behind sanctions against Iran, which suggests a preference for economic rather than military pressure, and even though he refused to come to Saudi Arabia's assistance in 2019 when Iran-linked armed groups attacked oil facilities in its Eastern Quarter, his prospective administration does include a hawkish faction that might see 'total war' as a way to finally realise regime change in Iran and terminate its nuclear programme. A 'total war' scenario would certainly feature a sustained US/Israeli bombing campaign to eliminate Iran's air defences, military capabilities and nuclear facilities. But this might not be sufficient. However, a ground invasion is risky since it can just as easily rally Iranians around the flag as fragment its already fragile regime.²¹ In any event, given required troop concentrations, such an invasion would be visible long ahead of its actual occurrence, which would give elements of the Iran-linked axis time to unleash mayhem across the region, attack US bases in Iraq and Syria in earnest and enable Hezbollah to engage Israel directly. If it found itself in sufficiently desperate straits, it is possible that Iran would try to block oil traffic in the Persian Gulf to generate international pressure on the US and Israel to stop the war, since oil prices would skyrocket (even though this would also affect Iranian revenues). In all versions of this scenario,

it is possible that Iran makes a dash for a nuclear weapon, which is also a possibility in scenario 3.

Scenario proximity and fluidity

Because the scenarios lie close to one another in terms of possible occurrence, they are not scenarios in the classic sense of outlining independent futures. To an extent, they bleed into each other and can shift back and forth rapidly. The scenarios 'fight for the status quo' and 'shifting red lines' have already occurred, and are likely to occur again. Moreover, there is an obvious escalatory pathway between the scenarios that runs from 1 to 2, 2 to 3 and then 3 to 4. However, more radical shifts between scenarios are also possible. For example, scenario 1 can turn into scenario 4 if a symbolic attack on a US base by Iran-linked elements causes mass casualties to which the US responds in force by bombing Iran directly, upon which Tehran might start to attack US bases in the region in earnest, or perhaps less well-defended bases of US partners, such as the Kurdish People's Defense Units (YPG) in Syria or the KDP in Iraq. Alternatively, scenario 2 could turn directly into scenario 4 if Israeli pushback against Iran seeking to shift a red line in Syria – say, by upgrading its military infrastructure on the Syrian Golan heights – resulted in direct strikes on Iran that would lead Tehran to respond with an unannounced missile/drone barrage on Israel. If it deployed the more modern part of its arsenal and coerced Gulf countries to stand aside, it could achieve a much higher level of destruction than it did in mid-April.

Due to their proximity, current high levels of tension and open yet low-intensity warfare, these scenarios can no longer be navigated by means of policy. Grand strategies – the pursuit of national objectives in international politics in a dedicated manner, on a long-term basis and via a portfolio of national resources²² – have especially become nearly impossible to execute because the current fighting on various

21 For different perspectives on Iran's transition since the 2022 protests: Azizi, Hamidreza, and Erwin Van Veen. 2023. "Iran in Transition: The Islamic Republic Is No More While It Lives On." *Iran in Transition* (blog). March 2023. <https://www.clingendael.org/iran>.

22 Kitchen, Nicholas. 2010. 'Systemic Pressures and Domestic Ideas: A Neoclassical Realist Model of Grand Strategy Formation'. *Review of International Studies* 36 (1): 117–43. <https://doi.org/10.1017/S0260210509990532>.

fronts has turned diplomacy into a military tool rather than enabling it to drive military action. Also, the range of variables to navigate has become so large that their combination can produce unexpected effects. The conflict environment has become highly securitised, fluid and unpredictable, meaning it can be radically influenced by relatively minor events.

Factors that influence the scenario driving forces

The two main driving forces of the scenarios – US (dis)engagement in the conflict and Iranian/Israeli aggressiveness versus restraint – are each

influenced by a number of factors. These are summarised in Table 1 below, in addition to their discussion in the scenarios outlined above.

There are at least two factors one might expect to see in Table 1 that do not appear. First, there is Israel’s lack of a ‘day-after’ plan for Gaza and the possibility that Israel gets bogged down in a low-level insurgency during which Hamas benefits from more Iranian support. Such a development could help realise a scenario of ‘shifting red lines’ or even ‘limited war’. In addition, Saudi-Israeli normalisation linked to a Saudi-US defence pact can cause Iran to change to a ‘shifting red lines’

Table 1 Key factors that influence the driving forces and the scenario pathways

	Driving force 1: <i>US accelerating or dampening regional conflict</i>		Driving force 2: <i>Israeli/Iranian military posture</i>
Factor	Possible effect	Factor	Possible effect
Presidential elections	Anger in the Democratic base about Biden’s Gaza policy and US popular reluctance to engage in another Middle East conflict will privilege scenarios ‘fight for the status quo’ and ‘shifting red lines’ until November 2024 Should Trump become president in November 2024, it is unclear how this will affect the US role in regional conflict	Domestic variables (e.g. unrest, extremism)	Protest in either country makes their regimes more vulnerable and yet more assertive (rally around the flag), which makes ‘shifting red lines’ and ‘limited war’ scenarios more likely Extremist power consolidation in either country sets the scene for more direct military action, inching towards ‘limited war’, or even ‘total war’
Type of Iranian military activity	Direct offensive Iranian military action against Israel without cause is likely to move the US to the scenarios ‘limited war’ or even ‘total war’ Indirect offensive Iranian military action against Israel beyond ‘fight for the status quo’ can gradually increase US support for Israel in ‘shifting red lines’ or ‘limited war’ scenarios	The stand-off with Hezbollah	The absence of a deal with Hezbollah may cause Israel to increase its aerial attacks or invade with ground forces, causing a shift to ‘limited war’ or ‘total war’ A deal with Hezbollah enables ‘fight for the status quo’ and/or ‘shifting red lines’ scenarios
Pivot to China, defense Ukraine	These strategic imperatives act as permanent brakes on US military posture, privileging the ‘fight for the status quo’ and ‘shifting red lines’ scenarios	Greater violence on the West Bank	Greater settler, IDF or Palestinian violence will trigger resistance and/or repression that can involve Hamas or Iran, or even spill over into Jordan. Implosion of the Palestinian Authority will force the IDF to establish military control over the West Bank to similar effects
Nuclear Iran	An overt and concerted effort by Iran to develop nuclear weapons can trigger the US to support Israel in a ‘limited war’ scenario, or even to engage in ‘total war’	Nuclear Iran	A covert effort by Iran to develop nuclear weapons is likely to trigger Israeli military action if detected, leading to ‘limited war’ that could turn into ‘total war’, depending on Iran’s response
International pressure	Unconditional US support for Israel has strengthened global narratives of neo-imperialism and -colonialism. US support for Israel against Iran can deepen such narratives. This risk can cause the US to privilege ‘fight for the status quo’ and ‘shifting red lines’ scenarios	Western pressure	Greater Western pressure on Israel about its occupation (e.g. BDS, ICC/ICJ, recognition State of Palestine) is likely to reduce international support in a conflict with Iran, privileging ‘fight for the status quo’ and ‘shifting red lines’ scenarios
Hit on a high profile target Such a hit can be a tipping point that shifts Israel/Iran into a ‘limited war’ scenario, or the US into a ‘total war’ scenario. Imagine a large loss of life among US service(wo)men, Israeli civilians or international staff			

or 'limited war' scenario for the same reason as Israel might in the face of an Iran-sponsored Hamas insurgency in Gaza: the need to act on a heightened threat perception. Neither factor appears in Table 1 because they are ultimately unlikely to shift the main driving forces of the scenarios.

A low-level Hamas insurgency against the Israeli Defense Forces (IDF) in Gaza will initially remain contained to the strip given the degradation of Hamas military capabilities and current Israeli control over the border with Egypt, including Rafah and the Philadelphia corridor.²³ Since Egypt appears unable or unwilling to force Israel into compliance with the provisions of the 1979 Egyptian-Israeli peace treaty, and since much of the international community cares little for the desperate humanitarian situation in Gaza, Israel retains the ability to operate in Gaza as it sees fit in the short term – at least, for as long as it enables a bare minimum of humanitarian access just shy of starvation and avoids large new offensives.

Saudi-Israeli normalisation is a tantalising prospect for both parties due to the US-Saudi defence link it might create. However, the Israeli government is not willing to pay the Saudi asking price in the form of a firm commitment to the realisation of a Palestinian state in the near future. This is unlikely to change under any other Israeli government because there is no Israeli political party from the centre rightwards that favours a sovereign Palestinian state on the 1967 boundaries and with East-Jerusalem as its capital. Unless Mohammed bin Salman is willing to settle – perhaps after his father's death – for

an 'ambiguous promise' rather than a 'firm commitment', or to accept a vaguer timeline than 'in the near future', the Israeli and Saudi positions are too far apart. While Saudi Arabia seems eager to do a deal with Israel to secure US side-payments in the form of a defence pact and access to nuclear technology for civilian purposes, Riyadh cannot ignore its status as Custodian of the Two Mosques or Israel's unpopularity among Saudis. As an alternative way of re-establishing regional stability, it might instead explore expansion of its relations with China, Russia and Iran.

Conclusions: Impact on the region

Even though a full analysis of the impact of each scenario on the region is beyond the scope of this brief, indicative effects can be outlined by way of conclusion and the same can be done for a few reflections about the strategic objectives of the conflict parties. In a 'fight for the status quo' scenario, low-level instability continues to pervade the Levant, which will make improvement of its poor economic situation and dysfunctional governance harder to achieve. Such a situation will also dampen the economic growth prospects of the Gulf states due to hesitant foreign direct investment (FDI). Finally, illicit trade in the Captagon stimulant, other drugs and other illegal goods and services are likely to expand due to the absence of regular economic activity. In a 'shifting red lines' scenario, the same effects are likely to occur but to a greater extent. The regional investment climate would deteriorate even though countries like Egypt and Jordan might benefit from greater Gulf and US support to keep them afloat fiscally and to prevent them being pulled into the maelstrom of Israeli occupation and annexation. However, in a 'limited war' scenario, at a minimum there will be widespread destruction in both Lebanon and Iraq as a result of confrontation between Hezbollah and the IDF in Lebanon and possible Iranian retaliation against the US in Iraq – depending on whether/how Washington supports Israel against Hezbollah. This scenario would also mean the end of any normalisation effort if its trigger is either further Israeli repression of the Palestinians or

23 Note, however, that a recent poll by the Palestinian Center for Policy and Survey Research (PSR) indicates that over 50 per cent of all Palestinians in the West Bank and Gaza view armed struggle as the best way to end occupation; about 66 per cent view the 7 October attack as a correct decision (57 per cent in Gaza); and 75 per cent of all Palestinians are satisfied with Hamas' military performance (64 per cent in Gaza). See: Palestinian Center for Policy and Survey Research. 2024. 'Public Opinion Poll'. Poll 92. Ramallah: PSR. <https://www.pcpsr.org/sites/default/files/Poll%2092%20English%20press%20release%2012%20June2024%20%28003%29.pdf>.

Hezbollah in a role as defender of Palestinian rights. In this scenario, Iran is also likely to infiltrate Jordan with the help of its assets in Syria and Iraq, or at least to put it under serious pressure by leveraging popular discontent with the Kingdom's stance on Israel. Finally, in a 'total war' scenario, large-scale destruction engulfs Iran, Israel, Lebanon and a number of US bases across the region. It also spells an end to Gulf modernisation efforts – such as Vision 2030 in Saudi Arabia – because violence, extremism and popular discontent are certain to disrupt economic development. Nuclear capabilities are likely to proliferate in this scenario as Iran seeks to ward off invasion through nuclear deterrence while neither Saudi Arabia nor Turkey will wish to fall behind.

The possible consequences of each scenario make a sobering case for the need to develop a set of conflict prevention measures between Israel, the US and Iran between now and the November US Presidential elections – such as hotlines, protocols that spell out red lines and tolerable action/reaction bandwidths, or even demilitarised zones. The core strategic objectives of the conflict parties suggest that

some progress can be made. Israel seeks to restore the security of its northern border without an all-out war against Hezbollah or Iran. It also intends to continue its occupation and annexation but, once its current government has vacated office, it might revert back to doing so under the radar. It does not care enough about normalisation with Saudi Arabia to discontinue these policies, which means it will not alter the regional security order to a degree that might truly threaten Iran. In turn, Iran seeks good relations with the Arab states on the Persian Gulf, recognition of the axis of resistance and itself as regional powers, as well as the isolation of Israel. From a realpolitik perspective, the Palestinians look more like a low-cost method for Tehran to get at Israel rather than representing a genuine ideological commitment. The US, finally, intends to uphold Israel's security by reducing the risks that Hamas, Hezbollah and Iran pose to it, but without triggering a region-wide, high-intensity conflict. There is sufficient overlap between these objectives to enable conflict prevention and confidence building measures that can avoid at least 'limited war' and 'total war' scenarios. But they will not happen by themselves.

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