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Future Pathways in the Middle East Conflict: How the War Could End or Escalate

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How the War Could End or Escalate

U.S. President Donald Trump's televised address last week left several questions unanswered about the future of the war in the Middle East. The war has already caused "the largest supply disruption in the history of the global oil market" and is poised to have even greater and more lasting effects on the global economy if it lingers on. While the U.S. President explicitly stated his intent to end military operations soon, some of the most fundamental questions being asked before his address still remain as pertinent.

How would active hostilities be brought to an end? On the other hand, what could trigger further escalation of the conflict despite President Trump's intention to pull out? Is there any scenario in which the regional conflict would transform into a global war?

I list here the possible pathways that: (i) offer a way to cease hostilities; (ii) lead to major vertical escalation within the regional context; or (iii) expand the war horizontally, pulling in even more countries. It also posits the bare minimum requirement for any deal between the U.S. and Iran.

Figure 1: Current theater of war



Pathways to cessation of hostilities

1. U.S. and Iran negotiate – directly or indirectly – a deal that results in an immediate ceasefire which continues to hold as intended.
2. The U.S. persists with intense military operations for 2-3 weeks after which it pulls back (in line with President Trump’s suggested timeline) with or without a negotiated deal; Israel ceases its military operations against Iran; Iran and its proxies also call an end to all their military actions in the region.
3. The U.S. and Israel massively scale up military attacks against Iran’s leadership and the Islamic Revolutionary Guard Corps (IGRC) as well as infrastructure (possibly including enriched uranium storage sites) across Iran over the next 2-3 weeks, leading to regime collapse and eventual capitulation.
4. The conflict prolongs and, at some point, Iran runs out of consequential military equipment (missiles, air defense, etc.) and is militarily defeated.
5. Israeli leadership is decapitated as Iran scores major successes, including striking civilian and military infrastructure in Israel that turns public opinion against the war and creates internal political dynamics that lead Israel to accept a ceasefire.
6. Iran inflicts additional pain on GCC countries, forcing them to seek immediate cessation of the conflict. Most GCC countries deny US/Israel airspace and use of their military bases to launch further attacks on Iran, after which US/Israel pull back. Iran halts its use of force as well.
7. Collective weight of great and multiple middle powers that are interested in an immediate end to the war are able to prevail through a combination coercive diplomacy (threats of diplomatic or economic isolation to Iran and Israel) and a realistically workable solution that allows all parties to ‘declare victory’. China and Russia’s role in pressuring Iran and the U.S. and Europe’s role in pressuring Israel will be critical.
8. The U.S. ends its military operation according to the intended timeline but does not detach itself from the end-game. President Trump and President Xi agree on a plan whereby China plays an outsized role in guaranteeing the opening of the Strait of Hormuz and the U.S. ensures that Israel ceases all military operations as part of a ceasefire.

Pathways to continued conflict and vertical escalation without a de-escalatory path in sight

9. Even if the U.S. and Iran agree to end hostilities, Israel and/or Iran's proxies continue use of force.
10. Any of the parties involved in direct conflict miscalculate their kinetic strategies such that the U.S., Israel, or Iran determine that a massive ramping up of kinetic actions has become necessary – whether out of anger or desperation. A tit-for-tat escalation cycle begins.
11. Israeli leadership is decapitated as Iran scores major successes, including striking civilian and military infrastructure in Israel that further hardens Israeli public opinion and leads to even greater use of force against Iran and/or its proxies.
12. U.S. decides to put boots on the ground on one of Iran's islands, the western coastal belt, or on the mainland.
13. A risky operation targeting Iran's enriched uranium ends in major casualties for the U.S. and/or Israel and leads to escalation after their massive retaliation against Iran.
14. Russia and/or China decide to back Iran aggressively (covertly) and encourage it to prolong the military fight against Israel after the U.S. withdraws.
15. Iran's proxies in the region disrupt sea lanes (Bab el-Mandab in the Red Sea) or manage to cause massive damage to Israel and Israel retaliates further against both them and Iran.

Pathways to horizontal escalation

16. One or more GCC countries join the war actively and move from absorbing Iranian attacks to their own offensive strikes – without further Iranian provocation or in response to Iran's escalated military attacks against them. Iran retaliates even more forcefully, directly or through proxy groups.
17. Any of the parties to the war or unrelated third parties with vested interests to spur further conflict strike one or more Russian or Chinese targets either as retribution for their alleged covert support to Iran or simply to instigate a larger conflict. China and/or Russia get involved overtly/directly thereafter.
18. A collective diplomatic effort by multiple countries to open the Strait of Hormuz fails, which prompts military action to forcibly open the strait. Iran retaliates in the immediate theater as well as against some of the countries involved, thereby enlarging the conflict.

19. Pakistan gets pulled into the active conflict by virtue of its defense pact with Saudi Arabia, possibly also leading to Iran's direct retaliation against Pakistan.

Wild cards that could expand the conflict significantly or end it abruptly

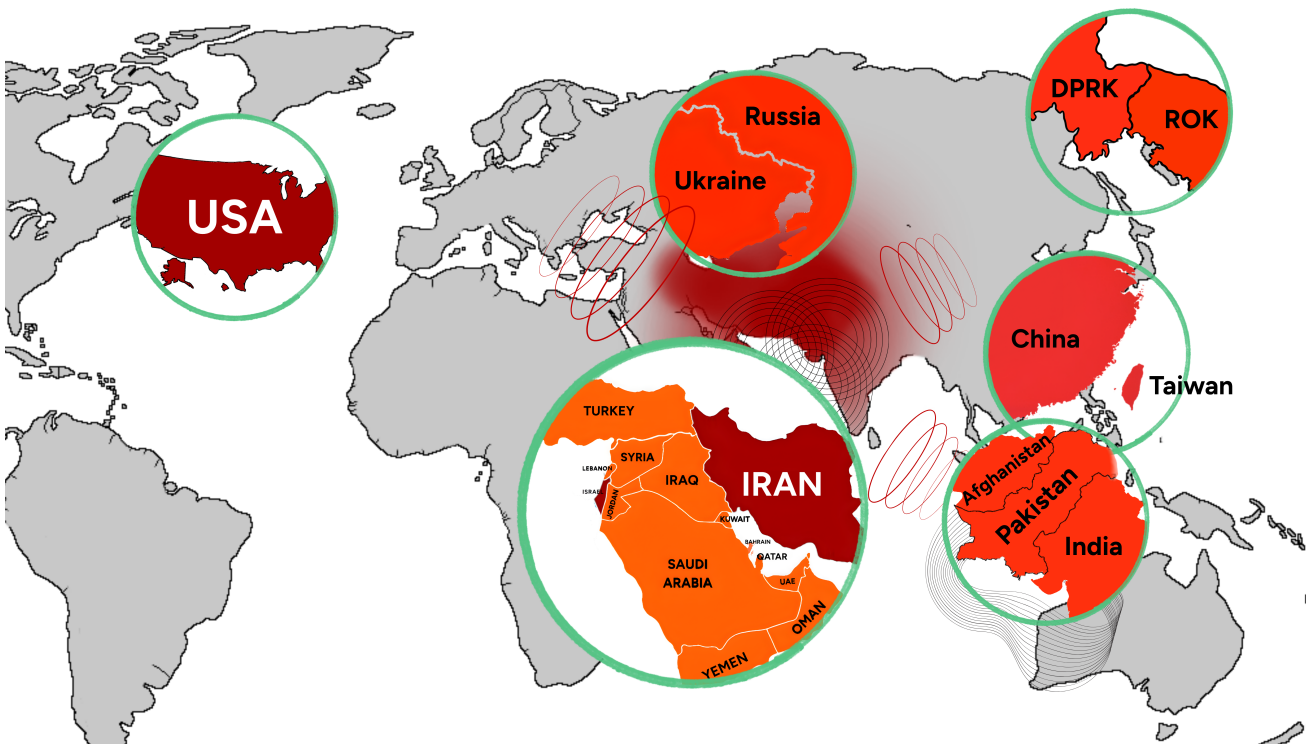
Further expansion scenarios

20. Iran or Iranian proxies/sympathizers conduct an attack inside Europe either unprovoked or in response to any European involvement in the conflict in support of the U.S. or Israel or a European role in forcibly opening the Strait of Hormuz. Europe is dragged into the conflict.
21. If Pakistan is pulled into the conflict directly (via Saudi Arabia) and distracted because of it, India may find it opportune to reinitiate 'Operation Sindoor', its military offensive against Pakistan it undertook in May 2025, which it has since insisted is only 'paused'. This results in an India-Pakistan war, in which Afghanistan may also play a role by covertly supporting non-state actors against Pakistan.
22. Sensing an opportunity because of the world's focus on the war in the Middle East, unrelated theaters of conflict with global implications are activated (China-Taiwan; South Korea-North Korea) or experience further intensification (Russia-Ukraine).

Further expansion or abrupt end scenarios

23. Iran inflicts massive damage on GCC after which GCC public opinion turns against Arab regimes, leading to another Arab Spring moment.
24. Use of tactical nuclear weapon on an Iranian island or mainland.
25. An attack on, damage to, or destruction of Al-Aqsa.

Figure 2: Potential global war theaters



Prerequisites for a negotiated off-ramp

President Trump's ultimatum to end U.S. military operations in 2-3 weeks makes negotiations even more critical given the prospects of a U.S. withdrawal without any deal to end the conflict. This could sow prolonged chaos in the region.

The minimum prerequisites for a negotiated off-ramp must include:

- U.S. and Iran formally agreeing to the terms of the deal, which at the very least will stipulate a ceasefire.
- Either Israel's formal inclusion in the deal or a U.S. guarantee that Israel will abide by the terms of the deal.
- Iran's guarantee that its regional proxies will also abide by the deal.
- A formal understanding on the management of the Strait of Hormuz acceptable to the U.S., Iran and any other party with the ability to disrupt the deal through diplomatic, economic, or military coercion (e.g. China).



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