

## Caution, The New Concept—From Overconfidence and Complacency to Distress

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The “concept” is a term that remains fixed in the Israeli public discourse after the 1973 Yom Kippur debacle. It refers to a failed overarching narrative that underlay Israel’s intelligence and security framework. As in 1973, the one that was shattered on October 7, 2023, was marked by overconfidence and complacency. When it shattered, Israel’s vulnerability to the Iranian “ring of fire” was exposed, adding to distressing matters directly involved in the war: The problem of the hostages in Gaza, overstretching of the military forces, increasing public pessimism, the growing economic price of war, the collapse of international legitimacy, the lack of solutions to the problem of the displaced from the northern communities and vis-à-vis Hezbollah, and Iran’s rapid progression toward the status of a nuclear threshold state. Given all this, a concept of distress has emerged, around which a consensus is quickly forming, with major questions pushed aside or repressed. This article examines the contradictions and failures of the new emerging concept.

The concept that was shattered on October 7, 2023, was, as in 1973, a concept of overconfidence and complacency: Israel has military superiority and vast intelligence reach in the region, Hamas is weakened and deterred, and the “war between the wars” is working overall to keep Iran and Hezbollah in check. With the collapse of this concept, Israel’s vulnerability to the Iranian “ring of fire” was exposed, as it appears to not have good answers to it. This is further compounded by the severe hardships involved in the war: The problem of the hostages in Gaza, the overstretch of the military forces, the growing public pessimism, the increasing economic cost of the war, the loss of international legitimacy, the lack of solutions to the problem of those displaced from the northern communities and vis-à-vis Hezbollah, and Iran’s rapid progression toward the status of a nuclear threshold state.

Given all this, we are witnessing the emergence of a new concept, held by many, including those who to one degree or another previously held its predecessor. From the ashes of a concept of overconfidence and complacency now rises a concept of distress. As with any concept, a consensus quickly forms around it between pundits, and major questions are pushed aside or suppressed. This is the time for a warning call

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and for the blind spots, contradictions, and failures embodied in the emerging consensus to be brought to the surface.

Here are the main assumptions of the new concept:

- An end to the war in the Gaza Strip is now called for, and Israel is anyway close to exhausting what can be achieved with respect to the destruction of Hamas's infrastructure;
- An agreement for the return of the hostages should be Israel's immediate priority;
- Israel can always resume the war afterward;
- Arab and international forces should be brought into Gaza in place of IDF forces;
- Without an end to the war in Gaza, no ceasefire will be achieved in the north, which, in turn, will lead to a diplomatic agreement to remove Hezbollah from the border;
- Normalization with Saudi Arabia and a US-led regional alliance will allow Israel to focus on dealing with Iran and its proxies, including Iran's nuclear threat.

In the face of all these, it should be emphasized:

Hamas is not expected to agree to anything less than a complete end to the war and a full withdrawal of the IDF from the Gaza Strip, with international guarantees. There are those who have not yet fully internalized this reality, while those who have already internalized it seem to have reached the conclusion that there is no choice but to accept Hamas's demands.

After Israel withdraws from the Gaza Strip, Hamas will resume its civilian control and military capabilities in the Gaza Strip at lightning speed—not immediately at the level of October 7, but at a sufficiently high level. There is no shortage of young men for recruitment in the Gaza Strip; bottlenecks in the tunnels system will be opened and restored; workshops to produce rockets will reopen; and along the evacuated “Philadelphi corridor” along Gaza's border with Egypt large-scale weapon smuggling activities, courtesy of Iran, will be resumed. **What is at stake is not what more can be achieved in Gaza, as some ask, but rather the most significant achievement already attained: The dismantling of Hamas's massive semi-state military infrastructure. Its reestablishment must not be allowed.**

Following an end to the war and an Israeli withdrawal, Israel will lack even the slightest international legitimacy to renew the war, and by itself it will not repeat the operation all over again after it tried its best, failed, and left Gaza. Targeted raids into Gaza will

also be fraught with heavy to prohibitive casualties after Hamas is allowed to rebuild its military system.

It should not be assumed that international and Arab forces will agree to get into the sick bed of the Gaza Strip, and if they do so, their fate will be somewhere between the fate of the US Marines in Beirut in 1982 and the helpless UN force on the Lebanese border. They will not fight Hamas, and their presence will only prevent the IDF from doing so. The Palestinian Authority, for its part, is weak and equally helpless. Its significant advantage is in being a civilian body in Gaza that is not Israel and that Israel's military freedom of action will be preserved as it is in the West Bank. The Palestinian Authority is the lesser evil as an alternative to Hamas's rule in the Gaza Strip, and therefore it is the desired solution for Israel, should the PA agree to enter the Gaza Strip at all, which is far from certain.

In return for the release of the hostages, the estimated half who are still alive out of the 120, Hamas will demand the release of all Palestinian prisoners imprisoned in Israel in an "everyone for everyone" deal. They are more than 10,000 in number, including those who conducted the October 7 massacres and the captives taken during the war in the Gaza Strip since then. These are all trained and highly motivated terrorists who will reinforce Hamas's forces in Gaza. The number of prisoners expected to be released has been repressed in the public consciousness. Hundreds of returning buses, carrying the cheering terrorists, will be greeted with exhilaration by the masses in the Arab world, who will celebrate with ecstasy Hamas's victory, survival, and return in the face of Israel's failure. The Palestinian street will become fully Hamas. As the Palestinian opinion polls show, the images of destruction in the Gaza Strip will not change this. They have become a symbol of Palestinian sacrifice and heroism on the way to victory. There is no room for illusions on this matter either. Hamas will drag the prisoners exchange over many months, will insist on the fulfillment of every period and comma of its demands, and will inflict humiliation after humiliation on Israel, as they will feel that the cards in this game are in their hands.

The international aid money flowing into Gaza will be appropriated by Hamas for its needs and exploited for its military empowerment. This will not change either.

A ceasefire in the north when the war ends in the Gaza Strip is possible and expected, but there does not appear to be a chance for a US-sponsored "diplomatic agreement" that will bring about Hezbollah's withdrawal from southern Lebanon according to UN Security Council Resolution 1701. On the contrary, it can be stated with near certainty that following the ceasefire, Hezbollah will return and deploy near the border. We should not fool ourselves.

Normalization with Saudi Arabia and a US-sponsored “regional alliance” against Iran will be a significant and very desirable achievement, but here too one must distinguish between its advantages and limitations. First, what will be perceived as a decisive victory by Hamas will severely limit the capabilities of the regimes in Saudi Arabia, Jordan, and Egypt to take steps of normalization and cooperation with Israel in the face of their public opinion. The informal regional alliance proved its defensive value during the Iranian missile attack on Israel on the night of April 13–14, 2024. But this alliance has no real offensive capabilities against the Iranian militias of the “ring of fire” in Yemen, Iraq, Syria, and Lebanon—no more, unfortunately, than the capabilities held by the United States and Israel. Most importantly, it has no offensive capabilities against Iran’s very near and expected transformation into a nuclear threshold state/an opaque nuclear state.

The idea that ending the war in the Gaza Strip will make it possible to deal more effectively with Iran’s nuclear capabilities has little basis in reality. Israel no longer has the offensive capabilities to stop the Iranian nuclear program at its current stage of development—if it ever did. The only one who can at least delay, if not stop, the Iranian nuclearization and, of course, destroy Iran’s economy from the air as a means of stopping the nuclearization is the United States. But the United States is not inclined to do so, regardless of the war in Gaza. President Biden will not do so before the presidential election, and it is doubtful whether he will do so if he wins. It looks like Trump will be even less inclined to do that. Trump’s withdrawal from the nuclear agreement with Iran, at the initiative and influence of Benjamin Netanyahu, was a grave mistake. The US agenda is focused on China and, since the outbreak of the war in Ukraine, also on Russia. Its policy is to try to buy the prevention of Iran’s nuclearization with a promise of benefits. Again, this has nothing to do with the war in Gaza.

**The question that arises: What are the alternatives?** They are not good, and that is what gives rise to the new concept.

The achievements of the intense stage of the war in Gaza—the elimination of Hamas’s semi-state military capability and its massive infrastructure—are critical achievements that should not be muddled with Netanyahu’s slogan of “total victory.” As soon as this stage is completed, very soon now, Israel should proceed as planned with a “lawn-mowing” strategy in the Gaza Strip by means of precision aerial bombardments and targeted raids—similar to what it does in the West Bank, only much more. Hopefully, within a reasonable time frame, Sinwar and those around him will be eliminated, and Israel will also achieve what is possible as far as the painful issue of the hostages is concerned. Any partial and temporary agreement for the release of hostages must be welcomed, as well as an offer to allow Sinwar and his people to leave Gaza in exchange

for the hostages. The chances of this happening appear to be slim. Unfortunately, after a period of national unity, the attitudes in Israel toward the war increasingly mirror, with deep conviction, the political identities of Israel's socio-political divide. And it is not as if political considerations are not involved on the part of Netanyahu, but also on the part of his rivals. The current debate in Israel does not deal whatsoever with the implications of Hamas taking back control of Gaza—it either represses or denies it.

Israel does not have good answers for the Lebanon front, not even after the intense fighting stage in the Gaza Strip is completed and Israeli forces are moved from Gaza to reinforce those in the north. Given the issues of the evacuees from the north, some 50,000, this situation heralds escalation in one way or another, even if it is not desirable for either party. A ceasefire now, with the intention of better preparing for the war against Hezbollah in a few years, as some suggest, will not solve the fundamental problems—in the region and internationally—tied with the war in Lebanon. And Hezbollah, and Iran behind it, will not rest on its laurels in the years to come.

Absent decisive American action, there is no answer on the horizon for the Iranian nuclearization, with or without any connection to the war in Gaza. Hopefully someday the regime will fall there—it does not look like this would happen any time soon—before it causes too much damage around it.

This is a somber prospect, part of the darkening global international picture, but one must look at reality with open eyes and not fall into new illusions, take comfort in them, and later pay a price for them. Israel fell into a deep pit on October 7th, and just like after the Yom Kippur War, it will take years to get out of it. Alongside worrying trends, Israeli society has many significant capabilities and qualities that can be built upon, and the severe crises it is facing may spur necessary and far-reaching changes.

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