

## Policy Brief

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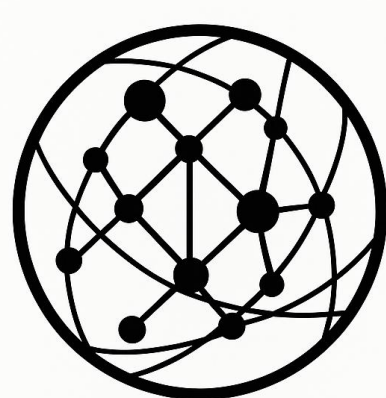
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## Recovery during Ceasefire:

### A Structured Assessment of U.S., Israel, and Iran Force Reconstitution

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### Key Judgments

- Ceasefire in the U.S.–Israel–Iran conflict does not produce stability; it redistributes time for competitive force reconstitution.
- Recovery trajectories are structurally asymmetric, shaped by differences in industrial capacity, external support, and operational constraints.
- The United States demonstrates high reconstitution capacity with temporal lag, reflecting industrial-scale regeneration dynamics.
- Iran exhibits rapid but partial recovery, constrained by structural damage and external pressure.
- Israel shows limited recovery depth but strong disruption capability, operating to degrade adversary reconstitution.
- The central strategic risk lies not in ceasefire failure, but in post-ceasefire imbalance, which may accelerate escalation toward systemic instability.

### Executive Summary

The April 2026 ceasefire in the U.S.–Israel–Iran conflict does not produce stability; it creates a competitive interval for force reconstitution, in which actors convert time into capability at unequal rates. Recovery dynamics are inherently asymmetric: the United States retains superior long-term capacity, Iran demonstrates faster but partial short-term recovery, and Israel operates primarily as a recovery-denial actor, prioritizing disruption over restoration. These differences generate divergent reconstitution trajectories, reshaping the post-ceasefire balance of power rather than stabilizing it.

Under conditions of non-enforcement, the decisive variable is not compliance with ceasefire provisions, but relative recovery performance. Asymmetric recovery produces temporary capability imbalances that increase incentives for preemption and escalation, making the ceasefire interval a critical phase in which subsequent conflict outcomes are determined.

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### Why This Matters

Ceasefires are often treated as mechanisms for de-escalation, but under conditions of non-enforcement and ongoing competition, they function instead as critical phases of strategic reconstitution. Misinterpreting ceasefire as stability risks overlooking how actors rebuild capability, adapt operational structures, and reshape the balance of power during this period.

Understanding recovery dynamics is therefore essential for anticipating post-ceasefire trajectories. Asymmetric reconstitution generates temporary advantages, increases incentives for preemption, and raises the likelihood of renewed escalation. For policymakers, the central challenge is not simply to sustain ceasefire, but to manage the recovery asymmetries that emerge within it. Failure to account for these dynamics may lead to systematic underestimation of escalation risk.

#### 1. Problem Framing: Ceasefire as a Recovery Phase

The April 2026 ceasefire between the United States and Iran, partially sustained through indirect negotiations, has been widely interpreted as a mechanism of de-escalation. This interpretation, however, understates the functional role that ceasefire plays under conditions of non-enforcement and ongoing strategic competition.

Emerging evidence suggests that the ceasefire operates less as a stabilizing pause than as a competitive interval for force reconstitution, during which actors actively convert time into operational capability. Rather than suspending conflict dynamics, the ceasefire restructures them.

Recent developments illustrate this pattern. The United States has maintained a substantial forward-deployed force posture in the region while signaling continued readiness to resume combat operations. Iran, despite significant infrastructure degradation, has continued efforts to restore operational assets, including missile systems and launch capabilities. At the same time, Israel has sustained military activity in adjacent theaters, particularly in Lebanon, effectively operating outside the functional bounds of the ceasefire.

Taken together, these dynamics indicate that ceasefire does not eliminate conflict capacity; it redistributes it across time. The key analytical shift, therefore, is from viewing ceasefire as a condition of reduced activity to understanding it as a phase of strategic adaptation, in which the balance of power is reshaped through uneven recovery trajectories.

#### 2. Analytical Framework: Force Reconstitution under Constraint

This brief develops a structured analytical framework to assess force reconstitution dynamics under ceasefire conditions. Rather than treating recovery as a uniform or linear process, the framework conceptualizes reconstitution as a constrained and uneven transformation of time into operational capability. Three interrelated dimensions define this process.

##### 2.1 Recovery Speed

Recovery speed captures the rate at which actors restore operational functionality, including weapons availability, force readiness, and deployment cycles. It reflects short-term adaptation and the ability to generate immediately usable capabilities under ongoing operational pressure.

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### 2.2 Recovery Capacity

Recovery capacity refers to the structural foundation that sustains regeneration over time. This includes industrial depth, logistical integration, and access to material and organizational resources. Capacity determines not how quickly actors recover in the short term, but the scale and sustainability of recovery over extended periods.

### 2.3 Structural Constraints

Structural constraints encompass the limiting conditions that shape and bound recovery trajectories. These include physical damage to infrastructure, disruption of supply chains, political and economic pressure, and external interdiction. Constraints do not simply slow recovery; they define the feasible limits within which recovery can occur.

Taken together, these dimensions interact to produce differentiated recovery trajectories across actors, rather than a uniform pattern of post-conflict stabilization.

### 2.4 Conceptual Model: Recovery Index (RI)

To operationalize this framework, recovery is conceptualized as a composite function of speed, capacity, and constraints:

$$RI = f(\textit{Speed}, \textit{Capacity}) \times (1 - \textit{Constraints}) \quad (1)$$

Within this formulation, speed captures short-term regeneration, capacity reflects long-term sustainability, and constraints act as a bounding condition on effective recovery. Their interaction produces distinct reconstitution trajectories rather than a single measurable outcome.

Importantly, this framework is designed for structured comparative analysis under conditions of limited and imperfect data. Rather than relying on precise quantitative measurement, it enables systematic evaluation of relative recovery performance across actors while maintaining analytical rigor.

## 3. Actor-Level Assessment

### 3.1 United States: Industrial Reconstitution under Temporal Lag

The United States demonstrates the strongest structural capacity for force reconstitution among the three actors. This capacity is anchored in its global logistics integration, industrial scalability, and the ability to sustain forward deployment while maintaining operational readiness during the ceasefire period.

At the same time, U.S. recovery exhibits a clear temporal lag. The replenishment of high-end systems, particularly interceptors and precision-guided munitions, requires extended production cycles, reflecting the complexity and cost structure of advanced military systems. As a result, U.S. reconstitution prioritizes long-term sustainability over rapid battlefield restoration.

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This produces a recovery profile characterized by medium speed, high capacity, and moderate constraint. The U.S. model does not seek immediate parity restoration at the tactical level; instead, it converts time into durable strategic capacity, reinforcing its advantage in protracted competition.

### 3.2 Iran: Rapid but Constrained Reconstitution

Iran's recovery trajectory reflects a pattern of partial but accelerated restoration under conditions of significant constraint. Evidence of active recovery behavior, such as the excavation, reuse, and redeployment of missile systems, indicates a high degree of short-term adaptability. Despite extensive damage to infrastructure, Iran has retained a degree of operational survivability sufficient to sustain limited capabilities.

However, this recovery process is structurally bounded. Large-scale destruction of defense infrastructure, combined with maritime restrictions and broader economic isolation, constrains both the scale and sustainability of regeneration. Recovery is therefore uneven and dependent on external inputs, including logistical inflows and political shielding.

This results in a profile defined by high (but partial) recovery speed, low-to-medium capacity, and high constraint. Iran's reconstitution is adaptive but fragile, capable of generating short-term capability but facing significant limitations in sustaining long-term regeneration.

### 3.3 Israel: Limited Reconstitution, Active Disruption

Israel's position differs fundamentally from both the United States and Iran. Its recovery capacity is constrained not only by structural factors but also by its continued high operational tempo. Sustained interceptor usage and ongoing military activity limit the depth of reconstitution achievable during the ceasefire period.

At the same time, Israel operates partially outside the functional scope of the ceasefire, particularly through continued operations in adjacent theaters such as Lebanon. This enables it to shift from a recovery-focused posture to a strategy centered on disruption of adversary reconstitution.

Rather than prioritizing internal recovery, Israel maintains continuous pressure on opposing networks, targeting logistics, coordination, and recovery processes. In doing so, it reduces the effectiveness of adversary regeneration while preserving its own operational initiative.

This produces a profile characterized by low recovery speed, medium capacity, and high constraint, combined with a distinct functional role as a recovery-denial actor. Israel operates less as a system undergoing restoration and more as one actively shaping the recovery environment of others.

### 3.4 Comparative Assessment and Key Insight

The comparative assessment below summarizes differentiated recovery profiles across the three actors, highlighting variation in speed, capacity, constraints, and functional role during the ceasefire period.

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Table 1. Comparative Recovery Profiles during Ceasefire: U.S., Israel, and Iran

| Actor         | Recovery Speed | Capacity   | Constraints | Functional Role        |
|---------------|----------------|------------|-------------|------------------------|
| United States | Medium         | High       | Moderate    | Long-term regeneration |
| Israel        | Low            | Medium     | High        | Disruption / denial    |
| Iran          | High (partial) | Low–Medium | High        | Adaptive recovery      |

**Source:** Author’s compilation based on publicly available information, including official statements, media reporting, and open-source observations during the April 2026 ceasefire period.

**Note:** Categories reflect relative, not absolute, recovery performance. “Speed” captures short-term restoration, “Capacity” long-term regeneration potential, and “Constraints” limiting conditions. Assessments are based on observable indicators rather than verified quantitative inventories and are intended for structured comparative analysis under data uncertainty.

This comparison reveals a central structural pattern: recovery during ceasefire is not uniform, but structurally asymmetric, producing divergent reconstitution trajectories across actors.

These asymmetries are rooted in differences in industrial depth, network resilience, access to external support, and operational doctrine—factors that shape how effectively each actor converts time into capability. As a result, recovery unfolds along divergent pathways rather than converging toward a stable equilibrium.

Ceasefire therefore does not stabilize the balance of power; it redistributes capability unevenly across actors, actively reshaping the strategic environment.

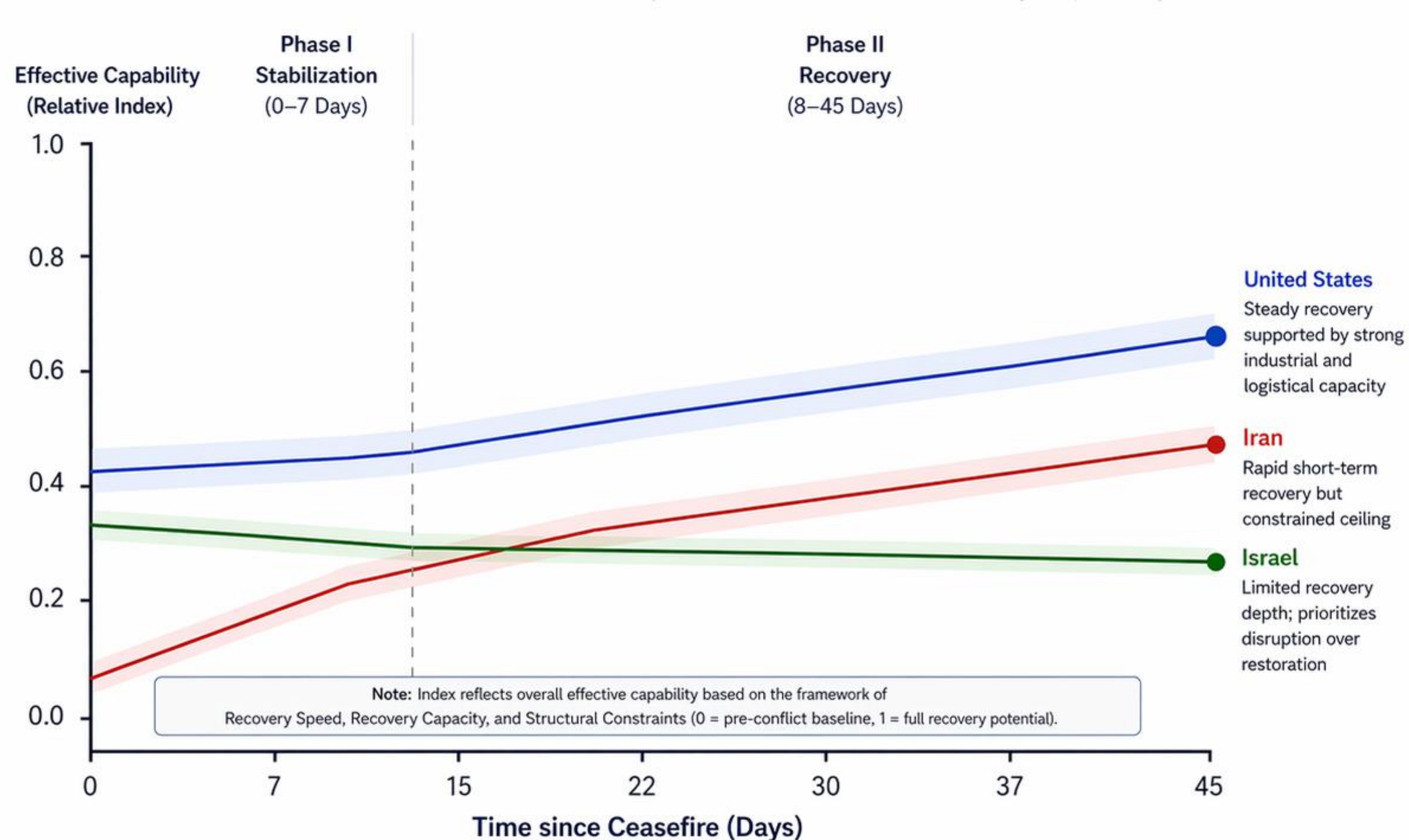
### 3.5 Key Insight

**Ceasefire does not pause competition. It redistributes it into recovery.** Under conditions of non-enforcement, the decisive variable is not compliance, but relative performance in force reconstitution. Actors recover at different speeds and toward different end states, producing widening capability differentials over time.

The strategic implication is that ceasefire may increase, rather than reduce, the likelihood of renewed escalation, particularly when recovery asymmetries create temporary windows of advantage.

These differentiated recovery profiles translate into the divergent trajectories illustrated in **Figure 1**.

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**Figure 1. Asymmetric Recovery Trajectories During Ceasefire (45-Day Window)**

**Caption:** Figure 1 presents comparative force reconstitution trajectories for the United States, Israel, and Iran over a 45-day ceasefire period. Recovery is represented as a composite index capturing the restoration of operational capability, logistics integration, and force readiness. The trajectories reveal structurally divergent recovery dynamics: the United States exhibits gradual but scalable regeneration; Iran demonstrates rapid but constrained recovery; and Israel maintains partial recovery while actively disrupting adversary reconstitution. These differences indicate that ceasefire functions as a competitive interval in which actors convert time into capability at unequal rates, reshaping the post-ceasefire balance of power. The resulting divergence increases the probability of escalation by creating transient windows of relative advantage.

**Source:** Author's compilation based on publicly available information, including official statements, media reporting, and open-source observations of military activity, logistics behavior, and force posture during the ceasefire period.

**Note:** Recovery trajectories are analytically constructed and represent relative—not absolute—levels of performance. The composite index captures short-term reconstitution dynamics, including capability restoration, logistics reintegration, and operational readiness. Estimates rely on observable indicators rather than verified inventories and are intended to support structured comparative analysis under conditions of uncertainty.

The figure operationalizes asymmetric recovery as a measurable divergence in time-to-capability conversion, linking recovery dynamics to escalation risk.

## 4. System-Level Implications

### 4.1 Ceasefire Redistributes Time, Not Risk

Ceasefire does not reduce the underlying intensity of conflict; it redistributes how that intensity is expressed over time. In practice, it shifts competition away from immediate confrontation toward the efficiency with which actors convert time into capability. Recovery performance, resource mobilization, and system adaptation become the primary arenas of strategic interaction during this phase.

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### 4.2 Recovery Asymmetry Drives Instability

Because recovery unfolds unevenly across actors, ceasefire generates structural imbalances in post-ceasefire capability. These asymmetries alter incentives, increasing the likelihood of preemptive behavior as actors seek to exploit temporary advantages before they dissipate. In this context, escalation is not driven by breakdown, but by differential recovery trajectories that create shifting windows of opportunity.

### 4.3 Persistent High-Risk Equilibrium

Taken together, these dynamics produce a condition best understood as a persistent high-risk equilibrium. The system remains highly coupled across domains, operates in proximity to escalation thresholds, and retains the capacity for rapid transition back to active conflict.

Ceasefire, therefore, does not resolve underlying drivers of confrontation. Instead, it sustains a fragile equilibrium in which instability is contained but not eliminated, and in which the conditions for renewed escalation are continuously regenerated.

## 5. Policy Implications

- **Shift from Compliance Monitoring to Capability Monitoring.** Under conditions of non-enforcement, adherence to ceasefire provisions becomes a secondary indicator. The more consequential variable is relative recovery performance, including how effectively actors restore operational capability, reconstitute logistics networks, and adapt force posture during the ceasefire period.
- **Prevent Asymmetric Recovery Windows.** Uneven reconstitution trajectories generate temporary capability imbalances that increase incentives for preemption and escalation. Managing these asymmetries, rather than assuming mutual restraint, is essential to mitigating post-ceasefire instability.
- **Recognize Ceasefire as a Strategic Phase.** Rather than treating it as a passive pause in hostilities, policymakers should approach ceasefire as an active domain of competition, in which actors seek to convert time into strategic advantage. Effective policy must therefore address not only conflict termination, but also the dynamics of recovery and adaptation that unfold within the ceasefire itself.

## 7. Limitations

This analysis relies on publicly available information, including official statements, media reporting, and open-source observations, which may be incomplete or subject to bias.

The framework adopts a structured comparative approach rather than precise quantitative measurement. Accordingly, the findings should be interpreted as relative and directional, rather than definitive estimates of recovery.

In addition, the analysis is temporally bounded to the April 2026 ceasefire period and does not fully capture longer-term dynamics or less observable domains such as covert activity and classified logistics.

These limitations define the scope of the analysis, which is intended to support structured inference under conditions of uncertainty.

**Policy Brief****Conclusion**

The current ceasefire in the U.S.–Israel–Iran conflict does not represent a transition toward stability. Instead, it constitutes a structured interval of competitive force reconstitution, in which actors convert time into capability at unequal rates.

The central strategic challenge is therefore not sustaining ceasefire itself, but managing the asymmetries it produces.

In modern conflict, the decisive phase may not be the battle, but the interval between battles, where capability is rebuilt, advantages are reconfigured, and the conditions for escalation are set.