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Policy Brief

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Renewed Strikes and the Risk of Conflict Resumption:

Assessing June 3 Escalation Dynamics after the Fragile Ceasefire

Author: Shaoyuan Wu

Affiliation: Global AI Governance and Policy Research Center, EPINOVA LLC

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Key Judgments

- **June 3 is the most serious test of the post-ceasefire order so far.** Reported attacks on U.S.-linked military nodes in Bahrain, Kuwait, and the wider Gulf challenge the ceasefire's credibility and raise the risk of conflict resumption through repeated violations.
- **The June 3 episode differs from the February 28 opening phase.** February 28 was coercive initiation by the U.S.–Israel side; June 3 reflects retaliatory reactivation under incomplete de-escalation, contested Hormuz governance, and weak enforcement.
- **Hormuz has returned as an operational escalation pathway.** The reported sequence involving an Iranian tanker, Qeshm Island, U.S. strikes, maritime retaliation, and Gulf base attacks suggests that Hormuz is again a battlefield linkage point, not only a negotiation issue.
- **Partial conflict resumption is now more likely than either immediate full-scale war or rapid diplomatic recompression.** If Iran's reported suspension or pause in talks is sustained, the ceasefire may remain formally alive while limited military operations resume under self-defense, retaliation, navigation protection, or deterrence language.
- **Israel remains a key escalation variable.** Continued Israeli operations against Iran-linked targets could lead Tehran to treat the ceasefire as incomplete, weakening U.S.–Iran de-escalation efforts and increasing the risk that regional fronts overtake the diplomatic track.
- **The policy challenge is shifting from ceasefire negotiation to ceasefire control.** A durable arrangement requires incident management, force-posture limits, short-cycle verification, maritime deconfliction, and a mechanism for Israel-linked escalation pathways.

Executive Summary

June 3 marks a critical inflection point in the U.S.–Israel–Iran conflict. Reported attacks on U.S.-linked military nodes in the Gulf occurred after the conflict had shifted from high-intensity coercion toward fragile procedural de-escalation. By late May, diplomacy focused on suspending hostilities, reopening the Strait of Hormuz, sequencing the nuclear issue, and preserving a politically usable exit framework. The June 3 events place that framework under direct pressure.

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This brief argues that June 3 is not a simple repeat of the February 28 opening phase. February 28 was defined by coercive initiation: U.S.–Israeli military action aimed at degrading Iranian capabilities and shaping settlement terms. June 3 reflects retaliatory reactivation, in which incomplete ceasefire arrangements, contested maritime rules, and weak enforcement mechanisms allow local incidents to propagate into broader escalation.

The reported suspension or pause in Iranian communication with Washington further shifts the baseline. The most likely near-term outcome is no longer controlled diplomatic recompression, but partial conflict resumption under residual diplomatic ambiguity. This would involve continued strikes, weakened negotiations, and a narrowing boundary between diplomacy and coercion. In such a scenario, the ceasefire may remain formally alive while becoming operationally hollow.

Preventing this outcome requires moving beyond broad ceasefire language toward concrete control mechanisms: maritime incident management, short-cycle reciprocal restraint, force-posture freezes, threshold buffers around U.S. bases, Israeli constraint protocols, and sequencing nuclear negotiations after immediate crisis control.

The central policy lesson is that, under non-enforcement conditions, a ceasefire is not a promise. It is a system design problem.

Why This Matters

The June 3 attacks matter less because of their immediate scale than because of their timing. They occurred after the conflict had entered a fragile de-escalation phase, when diplomacy was attempting to preserve a ceasefire framework, restore Hormuz stability, and keep the nuclear issue on a sequenced negotiation track.

By June 3, the conflict system was no longer operating from a low-pressure baseline. Months of military strikes, air-defense consumption, maritime disruption, sanctions escalation, energy volatility, proxy-front activity, alliance stress, and information competition had already reduced the system’s capacity to absorb new shocks. Under these conditions, even limited incidents can generate disproportionate escalation effects.

The central danger is cumulative erosion rather than automatic full-scale war. If limited attacks continue while talks are suspended, weakened, or only rhetorically preserved, the parties may drift into renewed conflict without formally acknowledging that the ceasefire has failed. The key question is whether the post-ceasefire control architecture can absorb the June 3 shock without entering a renewed cycle of retaliatory strikes.

Methodological and Source Note

This brief is based on public reporting available as of June 3, 2026, including Reuters, AP, The Guardian, regional media reporting, and prior EPINOVA analytical frameworks on the U.S.–Israel–Iran conflict. Reported battlefield claims remain contested and should be treated as provisional unless independently verified.

The analysis focuses less on definitive attribution of each incident and more on the escalation structure produced by the reported sequence of maritime, base, aviation, and diplomatic developments. Reported claims that Iran has suspended or paused talks are treated as a major risk indicator, but not as definitive proof that all diplomatic channels have permanently closed.

Scenario probabilities should be read as structured analytical estimates rather than statistical forecasts. They reflect relative plausibility under current information conditions and should be reassessed if new evidence emerges regarding casualties, infrastructure damage, Hormuz traffic, Israeli escalation, or the status of U.S.–Iran communication.

1. Background: A Fragile De-escalation Phase

The February 28 opening of the U.S.–Israel–Iran war began a high-intensity coercive phase aimed at degrading Iranian capabilities and shaping settlement terms. By late May, however, diplomacy had shifted toward procedural de-escalation: suspending hostilities, reopening the Strait of Hormuz, sequencing the nuclear issue, and preserving a politically viable exit framework.

That framework remained incomplete. Core disputes over enriched uranium handling, sanctions relief, Hormuz governance, U.S. regional posture, and Israel-linked escalation pathways were deferred rather than resolved.

The June 3 episode tests whether this fragile arrangement can absorb renewed strikes without sliding back into a cycle of retaliation.

2. The June 3 Episode: A Structured Rupture, Not an Isolated Incident

The reported June 3 episode contains four interconnected layers: a maritime trigger near the Strait of Hormuz, a strike involving the Qeshm Island communication environment, retaliatory pressure against U.S.-linked regional military nodes, and spillover into civil aviation and economic connectivity. Taken together, these layers suggest that the episode was not a discrete battlefield incident, but a test of the post-ceasefire control architecture.

2.1 Maritime Trigger

The immediate narrative begins around the Strait of Hormuz. Iranian sources have described the episode as a response to U.S. action against an Iranian tanker near the strait, while U.S. and allied accounts have emphasized Iranian missile activity, drone threats, or challenges to maritime security. These competing narratives remain contested.

The analytical significance does not depend on accepting either version in full. What matters is that maritime enforcement and retaliation appear to have returned as direct conflict triggers. This is strategically important because Hormuz was expected to move from battlefield contestation toward negotiated management. If tanker incidents, inspections, warning shots, electronic interference, or port-access restrictions again trigger military retaliation, the ceasefire framework will remain structurally fragile.

2.2 Qeshm Island Node

The reported strike on or near a communication node in southern Qeshm Island is significant because it involves a military-support environment rather than a purely symbolic target. Qeshm sits near the Strait of Hormuz and forms part of the geographic system through which Iran monitors, signals, and potentially contests maritime activity.

Strikes affecting such nodes can have escalation effects beyond immediate physical damage. Tehran may interpret them as efforts to degrade its ability to supervise or contest maritime flows. In a fragile ceasefire environment, even a limited strike on a communication tower or support facility can acquire broader strategic meaning if it is linked to Hormuz governance and maritime control.

2.3 Regional Base Retaliation

Iran’s reported missile and drone attacks against U.S.-linked military nodes in Bahrain, Kuwait, and possibly other Gulf locations shifted the episode from maritime friction to regional base-network confrontation.

U.S. bases in the Gulf are not merely local military facilities. They are nodes in a wider operational architecture supporting air defense, maritime patrol, logistics, command-and-control, intelligence collection, and deterrence signaling. Attacks on or near these nodes therefore matter even when physical damage is limited. They can force repeated defensive activation, raise host-nation risk, pressure Gulf partners, and test U.S. credibility.

Even unsuccessful or intercepted attacks can have strategic effects if they impose operational costs, disrupt aviation, or demonstrate that Iran retains the ability to stress the U.S. regional network.

2.4 Civil Aviation and Economic Spillover

Reports of airport disruption in Kuwait and broader airspace restrictions in the Gulf suggest that the episode moved beyond a military-to-military exchange. Once civilian aviation, insurance, shipping, port operations, and energy logistics are affected, the conflict re-enters the systemic domain.

This is the key difference between a contained military incident and a system-level rupture. A contained exchange affects military units. A systemic rupture affects the infrastructure through which regional order, commerce, and partner-state confidence are maintained.

Table 1. Comparison: February 28 vs. June 3

Dimension	February 28 Opening Phase	June 3 Renewed Attacks
Strategic character	Coercive initiation	Retaliatory reactivation
Primary initiator logic	U.S.–Israeli degradation campaign	Iranian response to perceived U.S. maritime and node strikes
Main battlefield	Iranian military and strategic infrastructure	Gulf bases, Hormuz nodes, vessels, airports
Escalation pattern	Top-down opening shock	Networked retaliation chain
Negotiation context	Pre-settlement coercive phase	Post-ceasefire and incomplete de-escalation phase
Main risk	Rapid expansion into full war	Ceasefire erosion through repeated limited violations
U.S. objective	Degrade Iran and shape settlement terms	Restore deterrence, protect bases, preserve negotiation leverage
Iranian objective	Survive opening shock and retaliate	Demonstrate remaining leverage and resist unilateral rules
Israeli role	Operational partner in the opening campaign	Structural escalation variable through Lebanon and Iran-linked fronts
System condition	Early shock under lower accumulated pressure	High-pressure system with reduced control margin

Note: This table compares the strategic structure of the two episodes rather than the verified scale of battlefield damage. The June 3 episode remains subject to reporting uncertainty and contested attribution.

Source: Author's synthesis based on public reporting available as of June 3, 2026, including Reuters, AP, The Guardian, regional media reporting, and prior EPINOVA analytical frameworks on escalation dynamics, ceasefire design, Hormuz governance, and cost-imposition conflict.

The central distinction is that February 28 opened the war, while June 3 tests whether the post-ceasefire structure can prevent the war from restarting. The June 3 episode appears smaller than February 28 in opening scale, but it may be more consequential in systemic context because it occurred after months of accumulated pressure, weakened restraint, and unresolved bargaining disputes.

The same distinction is visible in the MCCM v2.1+ risk-adjusted profile. February 28 shows a concentrated opening shock associated with coercive initiation. June 3 shows a broader system-wide pressure pattern, with elevated stress across maritime volatility, physical connectivity disruption, information amplification, decision friction, coordination decline, and proximity to hard escalation thresholds.

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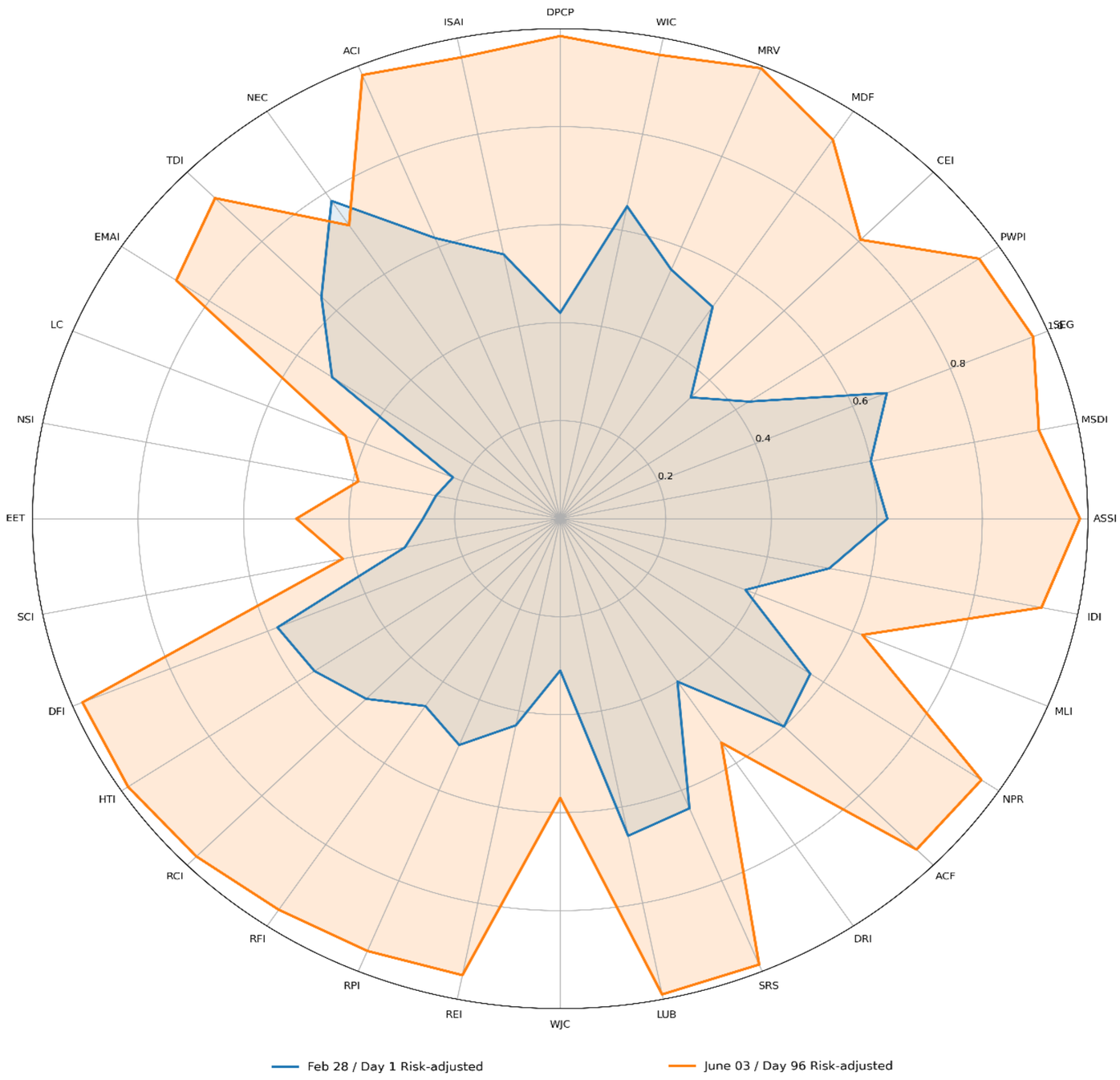
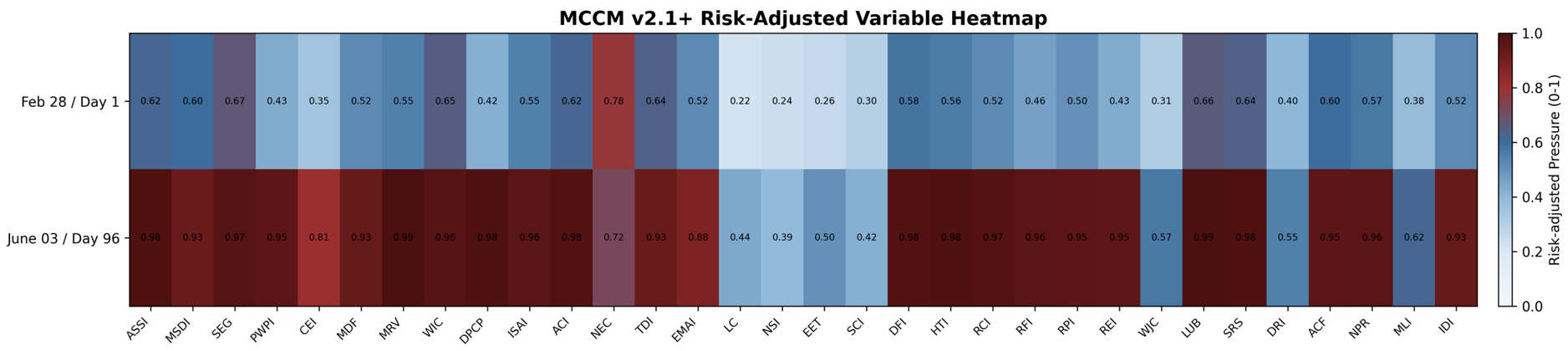


Panel A: Risk-adjusted radar profile



Panel B: Risk-adjusted variable heatmap

Figure 1. MCCM v2.1+ Risk-Adjusted Pressure Profiles: February 28 vs. June 3, 2026

Source: Author’s MCCM v2.1+ assessment.

Note: Panel A shows the overall expansion of risk-adjusted systemic pressure from February 28 to June 3. Panel B provides a variable-level comparison across MCCM v2.1+ indicators. LC, NSI, EET, SCI, WJC, DRI, and MLI are inverted so that higher values consistently indicate higher systemic danger. The figure compares analytical pressure profiles rather than independently verified battlefield measurements.

3. Analytical Assessment

3.1 The Ceasefire Architecture Is Under Stress

A ceasefire under non-enforcement conditions depends less on trust than on design. If violations cannot be externally punished, the arrangement must contain mechanisms that make violations visible, costly, and reversible.

The June 3 episode exposes several weaknesses in the current framework. It lacks a mutually accepted maritime incident mechanism, a clear force-posture freeze, a reliable attribution and verification channel, and a binding protocol covering Israel-linked fronts. Without these mechanisms, each side can interpret the other's actions as violations while preserving its own justification for retaliation.

This makes the problem more than diplomatic; it is an escalation-control problem. A fragile ceasefire may survive isolated ambiguity, but it is unlikely to withstand repeated ambiguity involving military nodes, oil flows, airspace, and allied bases.

3.2 Hormuz Is Again the Central Escalation Pathway

The Strait of Hormuz now plays three roles at once: it remains a physical chokepoint for energy and maritime flows, functions as a bargaining asset in U.S.–Iran negotiations, and has reemerged as an operational trigger for military retaliation.

This triple role makes Hormuz uniquely unstable. A limited tanker incident, inspection dispute, naval warning, or communication-node strike can quickly become a military event, a market event, and a diplomatic event.

For Washington, reopening Hormuz without legitimizing Iranian control remains a central objective. For Tehran, demonstrating that Hormuz cannot be governed without Iranian participation remains a source of leverage. The issue is therefore not only whether vessels can pass, but who defines the rules of passage, how violations are verified, and what response follows a violation.

3.3 The United States Retains Escalation Capability but Faces Control Costs

The United States remains the actor most capable of rapid high-end escalation. It retains long-range strike capacity, ISR integration, naval power, air-defense coordination, and alliance infrastructure.

The constraint is not peak capability, but control sustainability. Each additional U.S. strike may degrade Iranian assets, but it may also generate retaliatory pressure on Gulf bases, shipping, energy flows, and partner-state stability. As the conflict lengthens, Washington faces a cost-imposition problem: it can act, but each action can increase the cost of maintaining the wider regional system.

This does not imply a loss of military dominance. It means that military dominance does not automatically translate into political control under conditions of sustained network pressure.

3.4 Iran Is Pursuing Leverage Preservation, Not Conventional Victory

Iran is unlikely to seek decisive conventional victory over the United States or Israel. Its operational logic is better understood as leverage preservation: retaining strike capacity, demonstrating survivability, imposing costs, and preventing negotiations from proceeding solely on Washington's terms.

The June 3 episode serves that purpose. Even if many missiles or drones are intercepted, attacks aimed at Fifth Fleet-linked facilities, Gulf bases, vessels, or airports carry strategic signaling value. They suggest that Iran can still affect the regional operating environment and impose costs on U.S. partners.

This is cost imposition, not battlefield conquest. Iran does not need to defeat the U.S. regional military architecture outright; it only needs to show that the architecture remains vulnerable to repeated pressure.

3.5 Israel Could Determine Whether the Conflict Re-enters Full War

Israel remains a key escalation variable because its strategic logic differs from Washington's. The United States prioritizes control sustainability, coalition management, and avoidance of open-ended escalation. Israel prioritizes deterrence restoration, visible coercive credibility, and suppression of Iran-linked threats.

This divergence matters because Iran has repeatedly treated the conflict as multi-front. If Israeli operations in Lebanon or against Iran-linked networks continue while U.S.–Iran talks remain suspended, weakened, or only indirectly preserved, Tehran may judge the ceasefire to be structurally incomplete.

Under those conditions, even a U.S.–Iran de-escalation formula may fail unless it includes constraints on Israel-linked escalation pathways. A ceasefire that binds only part of the battlefield is not a stable ceasefire; it creates an uncovered front through which escalation can re-enter the system.

4. Scenario Outlook: Next 3–14 Days

4.1 Scenario 1: Controlled Recompression into Negotiation

Estimated probability: 20 percent

In this scenario, the June 3 exchange is contained despite the reported suspension or pause in Iranian communication with Washington. The United States limits its response to self-defense or narrow retaliatory strikes, Iran signals that its military response has been completed, Gulf states press both sides to avoid further escalation, and mediators attempt to reopen or preserve backchannel communication.

This scenario has become less likely if Iran's suspension of talks is sustained. The key indicators would include no confirmed U.S. fatalities, no additional Iranian missile or drone waves against Gulf bases, no major Israeli escalation against Lebanon or Iran-linked command nodes, and public statements from Washington and Tehran that leave some room for renewed indirect contact. Shuttle diplomacy by Oman, Qatar, Pakistan, or another mediator would become especially important, not simply as a continuation of talks but as a mechanism for restoring the minimum communication needed to prevent further escalation.

Under this pathway, the ceasefire survives, but only in weakened form. The principal policy implication is that an incident-management layer would become urgent. Without such a mechanism, the same type of maritime or base-related incident could quickly reopen the escalation cycle.

4.2 Scenario 2: Partial War Resumption Without Formal Declaration

Estimated probability: 55 percent

This is now the most likely trajectory. If Iran has suspended talks while military exchanges continue, the conflict is more likely to move into partial war resumption without a formal declaration. The parties may avoid announcing that the ceasefire is dead, but limited military operations would resume with increasing regularity. The United States could target Iranian missile, drone, radar, maritime, or command nodes; Iran could target U.S. base perimeters, maritime assets, air-defense stress points, or Gulf-linked infrastructure; and Israel could continue parallel pressure against Iran-linked fronts.

The indicators would include repeated strikes on Qeshm, Bandar Abbas, or IRGC maritime infrastructure; further Iranian missile or drone activity aimed at Bahrain, Kuwait, the UAE, or maritime targets; continued Israeli operations in Lebanon or Syria; persistent risk pricing in oil, shipping, and insurance markets; and ceasefire talks that either remain formally suspended or continue only rhetorically. Increased Gulf air-defense readiness, recurring civil aviation restrictions, and further interruptions in indirect U.S.–Iran communication would all point toward this scenario.

Under this pathway, the conflict enters a phase of kinetic bargaining. Diplomacy does not disappear completely, but it loses its stabilizing function. Military pressure again becomes the primary mechanism through which actors shape leverage, signal resolve, and test thresholds.

4.3 Scenario 3: Full War Resumption

Estimated probability: 25 percent

In this scenario, the June 3 exchange becomes the trigger for broader war. The reported suspension of talks increases the risk that future incidents will be interpreted through a military rather than diplomatic frame, but full war still depends on additional threshold events. Confirmed U.S. fatalities, major damage to a Gulf base, a successful strike on a high-value naval node, a major tanker incident, or sharp Israeli escalation could cause the parties to abandon restraint and return to a February 28-type trajectory.

The warning indicators would include confirmed U.S. military deaths, direct damage to Fifth Fleet facilities or major airbase infrastructure, a successful strike on a large naval platform, U.S. strikes on deeper Iranian strategic nodes, a formal Iranian announcement ending negotiations, effective collapse of commercial traffic through Hormuz, major Israeli expansion of strikes, or Gulf states moving from temporary airport restrictions to sustained emergency measures.

Under this pathway, the conflict would return to a broader war trajectory, but under worse systemic conditions than the opening phase because accumulated pressure is already high and the post-ceasefire control architecture has been weakened.

Taken together, the scenario outlook suggests that the June 3 episode has shifted the baseline from fragile de-escalation under stress toward partial conflict resumption under residual diplomatic ambiguity. The most important risk channels are maritime volatility, information amplification, decision friction, weakened coordination, and proximity to hard escalation thresholds.

5. Policy Implications

5.1 Treat Hormuz as a Governance Problem, Not Only a Security Problem

A durable arrangement cannot simply call for reopening the Strait of Hormuz. It must clarify how passage rules are defined, who monitors maritime activity, how incidents are investigated, and what forms of interference are prohibited. It should also establish procedures for deconflicting tanker traffic, naval operations, airspace restrictions, inspection claims, escort activity, tolling proposals, and blockade-related measures.

Without this governance layer, Hormuz will remain a recurring escalation trigger rather than a stabilizing corridor. The central issue is not only whether vessels can pass through the strait, but whether all parties understand how maritime incidents will be verified, interpreted, and managed before they generate retaliatory pressure.

5.2 Establish a Maritime Incident Cell

A dedicated maritime incident cell could reduce the risk that contested events at sea immediately become military triggers. Such a mechanism should include the United States, Iran, Gulf littoral states, and a neutral facilitator. Its mandate should remain narrow and technical: receiving incident reports, preserving vessel-tracking data, coordinating deconfliction messages, distinguishing accidental from deliberate incidents, and slowing escalation before attribution becomes politically fixed.

This mechanism would not require political trust or a comprehensive settlement. Its value would lie in procedural utility. In a contested maritime environment, even a limited channel for incident clarification can reduce the probability that ambiguous events become irreversible escalation points.

5.3 Shift from Full Ceasefire to Short-Cycle Reversible De-escalation

A full ceasefire without enforcement can create exploitation incentives. If parties believe that pauses allow adversaries to reposition, rearm, or prepare for the next round, nominal de-escalation may become strategically destabilizing.

A more practical model would be short-cycle, reversible de-escalation. This could involve renewable 72-hour pauses, simultaneous halts to new strikes, force-posture freezes, restrictions on new strategic deployments, rapid attribution channels, and limited concessions tied to verified restraint. The purpose would not be to resolve all disputes immediately, but to make violations visible and reversible while reducing the value of unilateral preparation during pauses.

5.4 Add an Israeli Constraint Protocol

Any U.S.–Iran arrangement that excludes Israel-linked fronts will remain structurally fragile. Israeli operations against Iran-linked actors in Lebanon, Syria, Iraq, or inside Iran could undermine a U.S.–Iran de-escalation framework even if Washington and Tehran seek to preserve it.

A separate constraint protocol should therefore address preemptive strikes, targeted killings, attacks on critical infrastructure, Lebanon-linked escalation, and public claims that invalidate ceasefire commitments. This would not require Israel to abandon deterrence. It would require that Israeli operations not become an unregulated pathway through which the U.S.–Iran ceasefire collapses.

5.5 Preserve Threshold Buffers Around U.S. Bases

U.S. regional bases have become high-risk escalation nodes. Washington should distinguish clearly among attacks that are intercepted without casualties, attacks that cause infrastructure damage, attacks that produce U.S. fatalities, and attacks that degrade core command or naval functions.

Each category should correspond to a defined response range. Ambiguity may preserve flexibility, but excessive ambiguity increases miscalculation risk. Threshold buffers would help separate symbolic or unsuccessful attacks from events that require major escalation, thereby reducing the chance that a limited incident produces an automatic broader response.

5.6 Separate Nuclear Sequencing from Immediate Crisis Control

The nuclear issue remains central, but making full nuclear settlement a precondition for immediate de-escalation risks blocking crisis control. A more workable sequence would first stabilize maritime and base-related attacks, restore limited Hormuz passage, establish verification and incident-management mechanisms, freeze further nuclear acceleration, and only then move to detailed negotiations on stockpile disposition, enrichment limits, and monitoring.

This sequencing does not concede the nuclear issue. It prevents the nuclear file from absorbing all diplomatic space at the moment when immediate crisis management is required.

5.7 Rebuild Mediator Utility Around Procedures, Not Guarantees

Mediators such as Oman, Qatar, Pakistan, Turkey, or Egypt are unlikely to possess the power to enforce compliance by the primary actors. Their value lies elsewhere. They can transmit signals, clarify red lines, authenticate incident reports, reduce misperception, and provide procedural legitimacy.

A realistic diplomatic design should therefore avoid asking mediators to guarantee peace. Instead, it should use them to support verification, message transmission, incident clarification, and structured sequencing. In a non-enforcement environment, mediation is most useful when it helps manage process, not when it promises outcomes it cannot compel.

6. Limitations

This brief is based on public reporting available as of June 3, 2026. Several details of the June 3 episode, including strike sequencing, target damage, interception outcomes, and attribution, remain contested and may change as additional information becomes available. The analysis therefore treats reported attacks, defensive interceptions, airport disruptions, maritime incidents, and base-related developments as provisional indicators rather than confirmed battlefield facts.

The scenario probabilities are analytical estimates, not statistical forecasts. They reflect the relative plausibility of near-term pathways under current information conditions. New evidence of U.S. fatalities, major infrastructure damage, Israeli escalation, Iranian suspension of talks, or sustained disruption in the Strait of Hormuz would require reassessment.

This brief does not offer legal judgments, operational recommendations, or sanctions-compliance guidance. Its conclusions should be read as policy analysis under uncertainty, focused on escalation-control design rather than attribution, legality, or military planning.

Conclusion

June 3 marks a major stress test of the post-ceasefire order in the U.S.–Israel–Iran conflict. It does not simply repeat February 28. The February 28 opening phase initiated the war through coercive escalation; the June 3 episode threatens to reopen it through the failure of incomplete de-escalation.

The central danger is not that one strike will automatically trigger full regional war. The greater risk is cumulative erosion. Repeated limited strikes, especially if paired with suspended talks or weakened backchannel communication, could hollow out the ceasefire while preserving the appearance of diplomacy. Under that condition, conflict would resume not through a formal declaration, but through accumulated exceptions.

The most likely near-term outcome is partial conflict resumption, marked by continued strikes, reduced diplomatic traction, and a narrowing boundary between negotiation and coercion. Preventing broader war requires moving beyond general ceasefire language toward a structured control architecture, including maritime incident management, short-cycle verification, force-posture freezes, Israeli constraint mechanisms, threshold buffers around U.S. bases, and reversible incentives.

The key policy lesson is that, under non-enforcement conditions, a ceasefire is not a promise. It is a system design problem.