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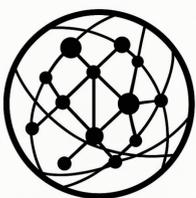
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The First Week of the U.S.–Israel–Iran War: Battlefield Assessment and Next-Phase Risks

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Executive Summary

The first week of the U.S.–Israel–Iran war has moved the conflict beyond the category of limited reprisal. It remains below the threshold of full-scale regional war, but it no longer fits the model of a short signaling exchange followed by de-escalation. The conflict has entered a more unstable intermediate condition: intense but unresolved, still below the threshold of wider regional war, and not yet out of control, but moving incrementally closer to escalation thresholds.

The central analytical point is straightforward. The conflict has not yet produced decisive military collapse on any side. But it has already generated a pattern of persistent missile-UAV exchange, widening maritime and economic spillover, and growing allied operational integration. In escalation terms, the war is best understood as operating in a Level 4–6 band: above limited punitive exchange, below full-scale major war, but clearly beyond episodic retaliation.

The first week should not be judged primarily by daily strike counts or competing victory claims. No principal actor has yet achieved a war-terminating advantage. More important is that the conflict is being sustained in an increasingly costly and tense zone of unresolved escalation. That condition is unstable because it allows risk to accumulate even in the absence of obvious strategic collapse.

The most consequential variable is not average strike effectiveness. It is the possibility of a threshold-crossing event: a successful hit on a critical military or political node, a major civilian-casualty incident, a sustained reduction in interception performance, or an explicit expansion of war aims by one of the principal actors. Such developments would carry effects far beyond ordinary battlefield losses. They would increase the risk of political overreaction, alliance escalation, and a sharper transition to broader war.

The war's cost structure reinforces that judgment. The conflict is no longer imposing only direct military costs. It is also generating broader systemic pressures through energy volatility, shipping rerouting, war-risk insurance, and airspace disruption. This matters because the war's strategic consequences are spreading through regional infrastructure and global logistics, not only through combat operations.

The United States retains substantial escalation capacity, but each additional layer of posture and operational integration raises fiscal exposure and political burden. Iran, by contrast, does not need to achieve decisive average penetration to derive strategic benefit. Under sustained high-tempo conditions, prolonged conflict itself may improve Tehran's position by increasing uncertainty, stretching defensive inventories, and raising the cumulative probability of a high-impact breakthrough.

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The first week can therefore be reduced to four judgments. First, the war remains unresolved, but escalation momentum is now firmly established. Second, the conflict is no longer a low-cost deterrent action; it is becoming a regional contest in which risk, cost, and spillover are rising simultaneously. Third, the war remains below the threshold of full-scale major war, but it is already well above the level of limited punitive exchange. Fourth, the next phase will likely be determined less by average combat performance than by whether a threshold-crossing event occurs.

The key question for the coming week is not whether additional strike rounds will occur. They almost certainly will. The more important question is whether three dynamics worsen simultaneously: missile-defense fatigue, expanding maritime and energy-channel disruption, and deeper U.S. movement from reinforced posture toward clearer joint-campaign integration and broader operational objectives. If two of these three trends deteriorate together, the conflict could shift from a condition of constrained escalation to a more unstable escalation environment.

The bottom line is that the war has not yet moved beyond the bounds of escalation control. But the margin of stability appears to be narrowing. This is likely to be the most consequential phase of the conflict: not open collapse, but the steady erosion of stability under conditions of continued confrontation.

2. Key Judgments

- a) **The conflict has not produced decisive military resolution, but it has already generated sustained escalation momentum.** The war has not yet resulted in systemic military collapse, large-scale mobilization, or confirmed strategic destruction sufficient to force termination. But it has plainly moved beyond episodic retaliation into a structured pattern of multi-domain confrontation.
- b) **What began as a coercive exchange is increasingly functioning as a contest of endurance, defensive expenditure, and strategic pressure.** Sustained missile-UAV exchange, continued defensive consumption, operational tempo, and widening spillover indicate that the conflict is shifting away from signaling alone and toward a system-on-system contest of sustained pressure.
- c) **The conflict occupies an unstable middle zone between limited punishment and wider regional war.** It is above the level of limited punitive action but still below full-scale regional war. This is often the most fragile zone because actors continue to believe escalation can be managed even as military, economic, and political pressures accumulate.
- d) **Threshold events, not average strike performance, are likely to determine the next phase.** The decisive variable is not whether most incoming strikes are intercepted. It is whether a single high-impact event alters the political and military logic of the conflict.

3. Why the First Week Matters

The first week matters because it has clarified the character of the conflict. The war is no longer best understood as a short-cycle exchange of punishment and restraint. It is becoming a sustained contest in which battlefield interaction, alliance coordination, economic spillover, and escalation psychology are operating simultaneously.

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That makes the conflict harder to contain. A limited exchange can often be stabilized through signaling and mutual restraint. A prolonged exchange is different. It imposes inventory pressure, widens the target environment, increases the role of alliance politics, and raises the probability that time itself becomes a destabilizing factor.

This is why the first week is analytically significant. The principal concern is not that one side has already won. It is that the conflict is being sustained under conditions in which continued stability appears to depend disproportionately on the non-occurrence of a threshold-crossing event.

4. Why the First Week Indicates Rising Escalation Risk

Three concurrent dynamics help explain why the conflict appears increasingly unstable.

- a) **Defense remains effective, but time is eroding the margin of safety.** Interception performance appears to have remained relatively strong during the first week. But sustained launch tempo, continued defensive expenditure, and prolonged operational stress increase the cumulative probability of a successful strike against a critical node. Even if per-strike success rates remain broadly stable, extended duration changes the overall risk profile.
- b) **The war's costs extend beyond direct military operations.** The conflict is generating wider systemic effects through energy markets, shipping disruption, war-risk pricing, and airspace constraints. These pressures broaden the strategic consequences of the war beyond the battlefield and increase the number of actors with a stake in escalation outcomes.
- c) **U.S. escalation remains operationally feasible but increasingly costly.** Washington retains superior force-projection capacity. But additional posture reinforcement and deeper operational integration impose rising fiscal, political, and strategic burdens. This creates an asymmetry: the United States can escalate, but it cannot do so cheaply or without broader consequences.

5. Operational Assessment After the First Seven Days

After seven days, the battlefield is best described as a condition of mutual consumption without decisive compression.

The United States, Israel, and their partners retain important advantages in force projection, strike coordination, and enabling capacity. Yet those advantages have not translated into rapid conflict termination. The war remains active, costly, and politically complicated.

Iran has not demonstrated decisive average penetration of the defensive system. But it has preserved a form of strategic leverage by maintaining tempo, imposing uncertainty, and keeping the conflict inside a high-cost operating band. This matters because prolonged confrontation itself can become a source of advantage when the opponent bears higher fiscal exposure and wider alliance-management burdens.

The result is a fragile equilibrium. The conflict remains below the threshold of wider regional war, but only conditionally so. Current stability should not be confused with durable control. It depends in significant part on the continued absence of a major threshold-crossing event.

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6. Next-Phase Outlook

The most likely near-term pathway is not an immediate transition to large-scale ground war. It is the continuation of high-intensity remote strike exchange, wider maritime and economic spillover, and deeper allied operational coordination.

That pathway would still remain below the threshold of full regional war. But it would continue to consume the margin of stability.

The more escalatory pathway would involve a threshold shift caused by one or more of the following:

- a sustained decline in interception effectiveness;
- confirmed destruction of a major strategic asset or critical node;
- a mass-casualty civilian event;
- explicit expansion of war aims by one or more principal actors;
- further erosion of targeting constraints and operational norms.

If these conditions emerge together, the conflict could move into a more volatile escalation band in which political decisions become sharper, diplomatic containment becomes harder, and military interactions become less predictable.

7. Indicators to Watch in the Coming Week

Three indicators deserve especially close scrutiny.

- a) **Missile-defense fatigue.** The key issue is not isolated failures, but a persistent decline in interception performance across multiple cycles. A sustained drop would have significance well beyond tactical air defense.
- b) **Maritime and energy-channel pressure.** If shipping disruption, insurance stress, and energy volatility intensify together, the war will increasingly shift from a theater crisis to a broader regional and global systems crisis.
- c) **Deeper U.S. movement toward joint-campaign integration and broader objectives.** The more Washington shifts from reinforced posture to clearer operational integration and expanded war aims, the harder escalation control will become.

If two of these three indicators deteriorate simultaneously, the conflict will likely move from constrained escalation toward a more unstable escalation environment.

8. Policy Implications

- a) **Do not treat temporary containment as evidence of strategic stability.** The absence of immediate strategic collapse should not be read as evidence that escalation risk is low. The current condition remains unstable because the conflict is active while the margin for error narrows.
- b) **Prioritize protection of critical military and civilian nodes most likely to produce threshold effects.** Escalation is most likely to accelerate through low-probability, high-impact events. Protection of strategic airfields, command nodes, maritime platforms, and dense civilian targets should therefore remain central.

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- c) **Treat time as a strategic variable rather than a neutral backdrop.** In prolonged missile-intensive conflict, duration is not neutral. Time increases inventory strain, political fatigue, and breakthrough probability.
- d) **Monitor systemic spillover as part of escalation warning, not as a secondary economic issue.** Energy, shipping, insurance, and airspace effects are part of the conflict's strategic impact and may shape escalation decisions as much as direct combat outcomes.
- e) **Watch for war-aim expansion as a leading indicator of a higher escalation band.** Operational intensity alone does not guarantee broader war. Political redefinition of objectives is often the clearer sign that the conflict is moving to a higher rung.

9. Bottom Line

The first week of the U.S.–Israel–Iran war did not produce decisive victory for any side. It produced something more consequential: a conflict that remains below the threshold of full-scale collapse, but in which the margin of stability is steadily narrowing.

That is why the most accurate conclusion after seven days is not that the war has already lost control. It is that control is becoming more fragile, more expensive, and more contingent with each passing day.

The central lesson is straightforward: the conflict remains below wider escalation thresholds, but the margin of stability is under increasing pressure.