

The De-Escalation Paradox

Why ending the 2026 US-Iran war may be harder than fighting it

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The ladder disappears where the light ends.

Robert Pape of the University of Chicago is one of the few academics who analyses this conflict in real time, with empirical discipline, and with the willingness to follow his conclusions into uncomfortable territory. His work on the escalation trap, built on two decades of war simulations involving Iran, has been among the most valuable contributions to the public understanding of this war. His recent introduction of a fourth

stage, in which Iran emerges as a new centre of world power through its control of roughly twenty percent of global oil supply, is a serious observation that deserves serious engagement.

This essay takes that observation as its starting point. It asks a different question: not what stage the world is in, but what mechanism produces the stages, and why the exit may be more dangerous than the trap.

The decision logic

Pape describes states. Iran controls Hormuz. The Gulf is fracturing into three groups. Markets operate on assumptions that no longer hold. Each of these observations is empirically sound. But a state is not an explanation. To understand why the conflict has arrived at stage four, and to anticipate what follows, you need the logic that connects one stage to the next.

Two thinkers provide it. Thomas Schelling, in *The Strategy of Conflict* (1960), described how each step in an escalation can feel entirely rational to the actor taking it, while the cumulative pattern produces an outcome no one would have chosen. The danger is not in the decision. It is in the structure that makes each decision feel like the only reasonable one. Herman Kahn, in *On Escalation* (1965), mapped forty-four rungs on a ladder from conventional conflict to nuclear war. His central insight is that as objective risk increases, subjective rationality increases with it. Each rung makes the next feel more justified, because the cost of retreating grows at every step.

Together they describe what stage-based analysis alone cannot. Pape sees that the world stands on rung X. Schelling explains why the actor on rung X does not experience himself as escalating. Kahn explains why rung X+1 looks more attractive than stepping back to X-1.

The paradox

If the United States declares victory and withdraws, Iran does not need to keep fighting. It needs to keep negotiating. And it holds the leverage to do so. Hormuz remains selectively closed. Iran's demands follow a recognisable post-conflict bargaining logic: reparations for destroyed infrastructure, lifting of sanctions that predate this war by decades, and international recognition of its nuclear programme with guarantees against future attack.

The pressure to meet those demands does not come only from Iran. China and India, whose economies depend on energy transiting the strait, become de facto advocates for Iran's terms. Not out of solidarity, but out of necessity. Iran wants recognition, China and India want energy, and all three benefit from a settlement that sidelines the United States.

Iran can go further. It can demand that the Gulf states reduce the American military presence as a condition for normalisation. As long as those bases remain, the strait stays restricted. The Gulf states then face a calculation: American security guarantees have just demonstrated their cost. Normalisation with Iran offers economic recovery. But Iran has also demonstrated, concretely, that it can strike Gulf infrastructure. That demonstration does not expire with a ceasefire. The Gulf states need protection against a threat that has been proven, while the protector itself is the obstacle to the settlement that would remove the threat.

That is the de-escalation paradox. Every party has rational reasons to come to the table. But the conditions under which one party can accept are nearly incompatible with the conditions under which another can. The post-war order Iran constructs is intolerable for Washington. The American presence that reassures the Gulf states is intolerable for Iran. The institutional system that might force Washington to change course is being actively dismantled, down to the dismissal of the Army Chief of Staff during the conflict itself. Every exit is blocked by the structure of the position.

The shadow

If the mechanism is not interrupted, it has an endpoint. When every conventional option has been exhausted, when withdrawal is politically unacceptable, and when continuation produces no different result, the structure pushes toward the one domain that still promises an immediate effect. That domain is tactical nuclear use. Not because anyone chooses it. Because the architecture of the position eliminates every alternative, and each step toward it feels more rational than the last. Kahn placed this zone between rungs fifteen and twenty-one. The current conflict is closer to that zone than any since 1945.

But the nuclear shadow does not only threaten. It also compels. It is precisely because the United States retains the capacity to escalate to the nuclear domain that every other actor has an interest in offering Washington a way out. China, Iran, the Gulf states, Europe: none of them want to discover whether the threat is a bluff. The shadow drives both escalation and the urgency to prevent it. The question is which moves faster.

The missing architecture

De-escalation requires a structure that does not yet exist. China is the only actor with direct leverage on both sides, but it also benefits from every week of delay that weakens the American position further. The facilitator has no urgency. Israel has the least interest in any deal that recognises Iran as a regional power, and the greatest capacity to sabotage one. The Gulf states cannot abandon American air defence systems while the threat they defend against has just been demonstrated, yet those systems anchor the very presence Iran demands be removed.

The actor most likely to fill the resulting vacuum is Europe. France already operates a military base in Abu Dhabi. The United Kingdom maintains one in Bahrain. Both are nuclear powers with historical relationships across the Gulf. Europe has its own incentive: energy security, a defence industry that needs scale, and a strategic autonomy agenda that requires proof of concept. The Gulf states have the means to finance such a transition. But the transition takes years. The escalation ladder does not wait.

The shared conclusion

On the fundamental outcome, Pape and this analysis converge completely. In every scenario, the United States emerges from this conflict significantly weakened. Its military assets remain unmatched. But the architecture that made those assets useful, the alliances, the legitimacy, the institutional trust that converted destruction into order, is being consumed faster than it can be rebuilt.

Pape counts four emerging power centres. The count is incomplete. The European Union and India are absent from his model. Iran's position, though powerful today, rests on a single control point whose relevance this war itself is accelerating away from. On the timescale of this conflict, Iran's leverage is formidable. On a longer horizon, it erodes. The emerging order has six poles, not four, and the most fragile is the one Pape places at the centre.

The difference between Pape's analysis and this one is not the conclusion. It is the path. Pape arrives through empirical observation of the world as it is. This essay arrives through the mechanism that produces it. The escalation has a logic. The de-escalation requires an architecture. The distance between the speed of the first and the readiness of the second is the measure of the danger we are in.

From the author

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