



Rolling Situation Report

# Middle East Situation Report

Issued: 6<sup>th</sup> September 2024

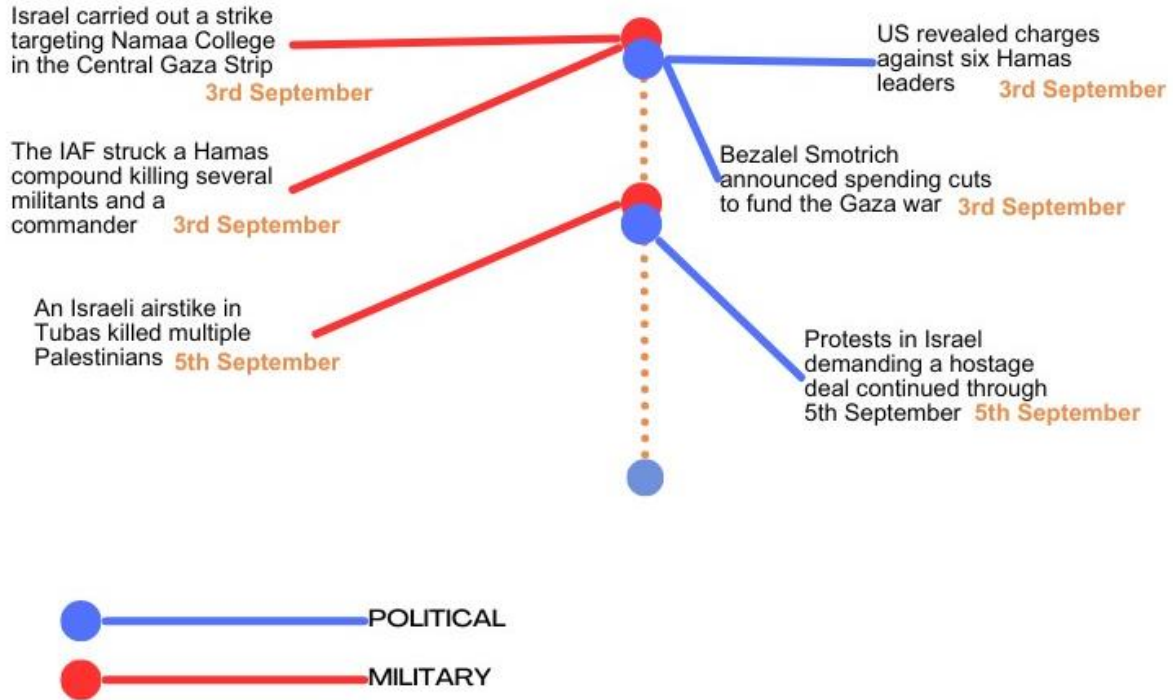
Authored by: MENA Desk

# Executive Summary

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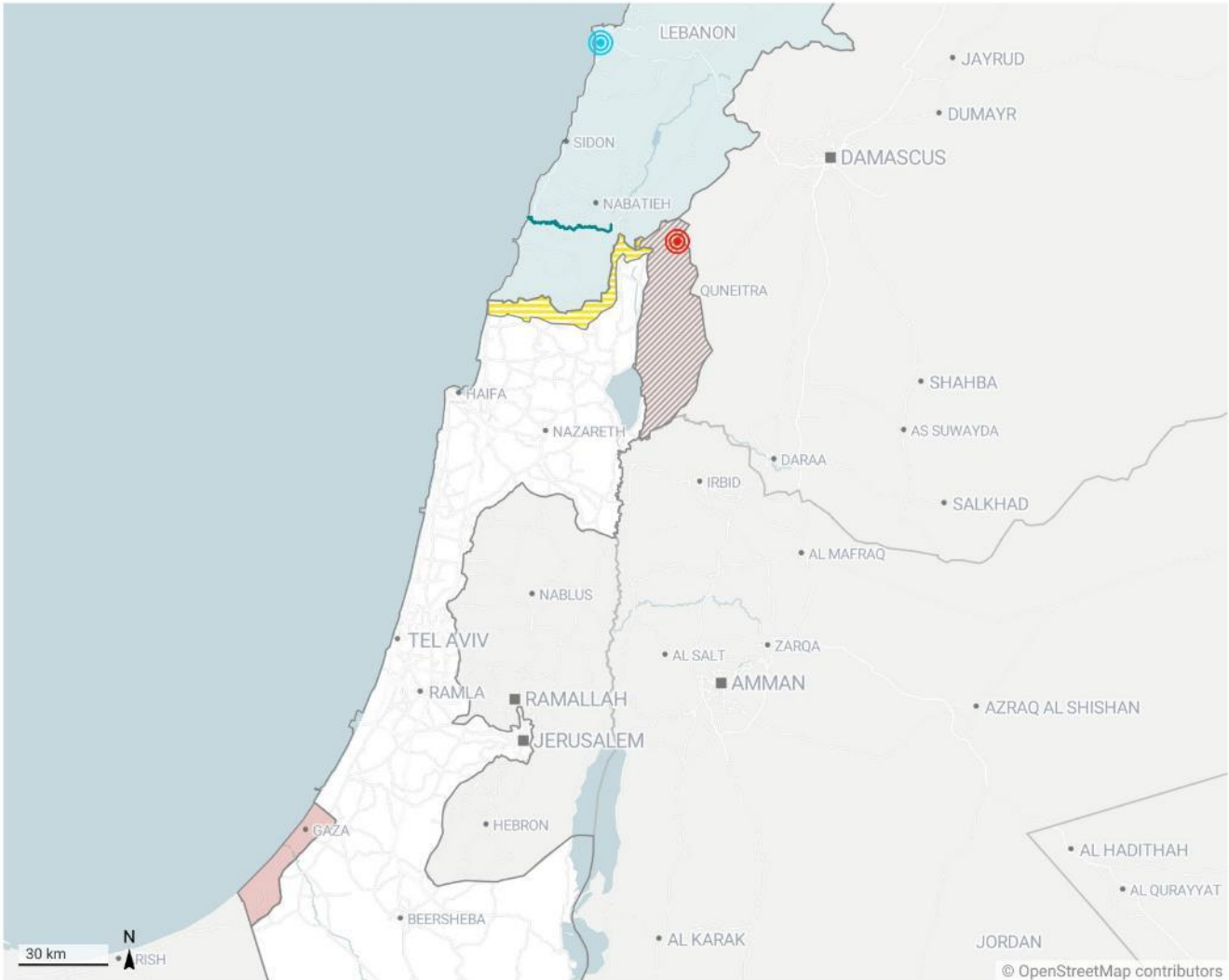
- Our mainline scenario sees an Israeli invasion of southern Lebanon to be unlikely in the short term. An Israeli invasion of southern Lebanon would increase in likelihood if Hezbollah struck cities further south in Israeli territory, giving Israel further impetus to push Hezbollah forces north of the Litani River.
- The IDF being stretched over three fronts, the threat of an Iranian retaliation, internal divisions within Netanyahu's cabinet, and mounting international pressure to sign a deal all make it unlikely that Israel would launch an unprompted ground invasion into Lebanon.
- We still anticipate further retaliatory attacks from Iran and Iranian-backed militants. The first retaliatory attack from Hezbollah was not coordinated with Iran and avoided civilian populations and critical infrastructure in Israel. Iran's response is likely to follow the same model of a controlled retaliation which does not escalate tensions into an all-out regional war. The Hezbollah retaliation was only the beginning of a series of retributions, according to Hezbollah leader Hassan Nasrallah; retaliation from Iran and the remaining Axis militant groups is expected regardless of a ceasefire deal.
- Ceasefire negotiations between Israel, the US, Qatar and Egypt (with Hamas participating indirectly) took place in Doha on 15<sup>th</sup> and 16<sup>th</sup> August. Another round took place on 22<sup>nd</sup> August in Cairo. The ceasefire negotiations were outlined as a potential reason for Hezbollah's delayed response. Back-channel negotiations are still ongoing.
- The IDF continued its clearing operations in Rafah and around the Netzarim Corridor and completed its operation in Khan Younis.

# Israel-Hamas Conflict 2024



# Risk Mapping

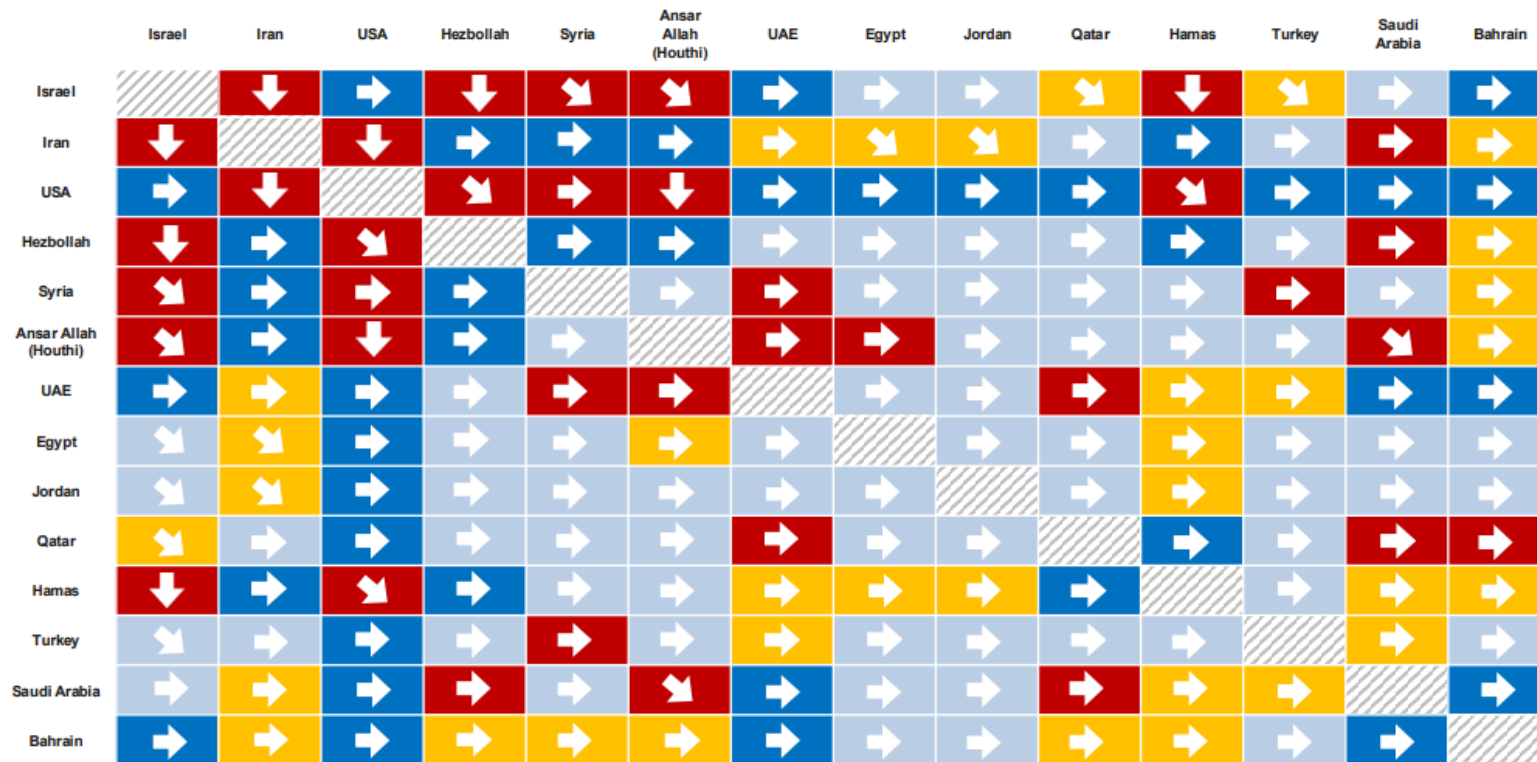
## Israel/Lebanon



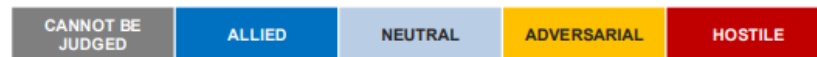
- Beirut Attack
- Majdal Shams Attacks
- Litani River
- Israeli Evacuation Zone
- Israel
- The Occupied Golan Heights
- Lebanon
- Gaza Strip

Map: Healix GSOC • Source: Institute for the Study of War • Created with Datawrapper

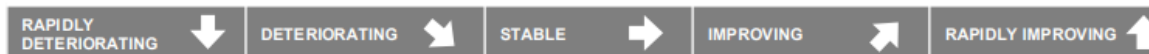
# MENA Relationship Chart



RELATIONSHIP CATEGORIES



TREND



# Developments

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## Military

### *Israel and the Palestinian Territories*

#### **The IDF's counter-terrorism operation in the West Bank continued.**

Hamas, the Palestinian Islamic Jihad (PIJ), the al-Aqsa Martyrs' Brigades, and the Mujahidin Brigades all engaged in attacks with small arms and IEDs on 3<sup>rd</sup> September, targeting Israeli forces in Tulkarm City, located in the West Bank. Hamas claimed that since the start of counter-terrorism operations on 28<sup>th</sup> August, the IDF has killed at least 30 Palestinian militants in the West Bank, and they called for further escalation in targeting Israeli civilians across the region.

#### **Several IDF forces found and destroyed a 0.6 mile (one kilometre) long tunnel in Beit Lahia, in the northern Gaza Strip.**

The tunnel was located through a joint operation by the IDF Gaza Division, the Northern Brigade, and the Yahalom combat engineers. During the search on 3<sup>rd</sup> September, weapons, electronic infrastructure, and rail transport tracks were uncovered.

#### **Israel struck the Namaa College building in the Central Gaza Strip on 3<sup>rd</sup> September.**

The IDF declared that Hamas was using the college to plan and conduct attacks against Israel. The strike resulted in the deaths of seven Palestinians who were sheltering in the college building. Witnesses reported the destruction of one of the college buildings. The Palestinian Civil Defence Agency issued a warning about the potential for further strikes on the college by the IDF.

#### **The Israeli Air Force (IAF) struck a Hamas compound, killing several militants and a commander on 3<sup>rd</sup> September.**

The compound, situated south of the Daraj neighbourhood in Gaza City was struck, resulting in the death of Ahmed Fawzi Nasser Mohammed Wadiyya, a commander of Hamas' Nukhba special operations forces, along with seven fighters from the Faraj and al-Tuffah Battalions.

#### **An Israeli airstrike in Tubas killed at least five and injured two Palestinians on 5<sup>th</sup> September.**

The airstrike hit a car in Tubas, in the West Bank. Later in the West Bank, Israeli forces shot dead Majed Fida Abu Zeina in Far'a refugee camp after they dragged his body out of the refugee camp with a bulldozer.

## **Netanyahu announced that the IDF might withdraw from the Philadelphi Corridor in the second phase of a ceasefire agreement.**

Israeli negotiators informed Qatari mediators on 2<sup>nd</sup> September, that the IDF would fully withdraw from the Philadelphi Corridor in the second phase of a potential hostage deal. This information emerged on 4<sup>th</sup> September, just 48 hours after Prime Minister Benjamin Netanyahu held a press conference asserting the corridor's crucial role in Hamas' operations and justifying an indefinite Israeli presence there. Reports suggest that Israel is prepared to reduce its military presence in the corridor in an initial phase, with a complete withdrawal in the second phase. Netanyahu's office has not disputed these reports but has noted that the second phase of the deal has yet to be discussed within the cabinet. Several Israeli officials have criticised Netanyahu's 2<sup>nd</sup> September press conference, claiming that his statements have disrupted ongoing back-channel negotiations.

Benjamin Netanyahu held a second press conference on 4<sup>th</sup> September where he reiterated that Israel must keep a presence along the corridor. Netanyahu argued that Israel's disengagement with the corridor in 2005 enabled Hamas to become a serious threat by use of the tunnel networks. Netanyahu explained that he would only consider a complete withdrawal in the second stage of the ceasefire deal if another international entity could ensure that Hamas does not use the corridor as a smuggling route.

### ***Lebanon***

#### **Hezbollah and the IDF continued engaging in cross-border attacks.**

Hezbollah targeted the Neto Mordechai settlement for the first time on 4<sup>th</sup> September. While cross-border attacks continued, multiple Israeli commanders held a training exercise on 3<sup>rd</sup> September to increase readiness for a potential direct conflict in northern Israel. Several Northern Command generals participated in these exercises.

At least one rocket was fired into the Elkosh and Fassuta districts in northern Israel on 5<sup>th</sup> September. Despite being populated towns, there were no reported injuries.

#### **1307 rockets have reportedly been fired from Lebanon into northern Israel throughout August.**

This marks the largest quantity of rockets from Lebanon into Israel since the beginning of the cross-border conflict. Thousands of residents from Israel's northern towns have been evacuated, with many blaming the Israeli government for not doing enough to establish security on Israel's northern border.

### ***Iran and Iranian-backed militant groups***

#### **The US Central Command (CENTCOM) destroyed two Houthi missiles on 2<sup>nd</sup> September.**

The strike occurred after US intelligence deemed the missiles to be an imminent threat to vessels in the Red Sea.

#### **The Islamic Resistance in Iraq claimed a drone attack on Haifa Port on 3<sup>rd</sup> September.**

The drone was intercepted by Israeli defence systems before it could enter Israeli territory.

## **Political**

### ***Israel and the Palestinian Territories***

#### **US charged Hamas leaders over the 7<sup>th</sup> October 2023 attack on Israel.**

The US announced criminal charges against Hamas leaders for their involvement in planning, supporting, and executing the 7<sup>th</sup> October 2023 attack that sparked the ongoing war. The individuals charged on 3<sup>rd</sup> September include Yahya Sinwar, the current head of Hamas; Khaled Meshaal, head of the Hamas diaspora office in Doha; Ali Baraka, a senior Hamas official in Lebanon; and three deceased Hamas members—Ismael Haniyeh, Mohammed Deif, and Marwan Issa. Although these charges were filed in February, they were kept secret in anticipation of capturing Ismael Haniyeh.

#### **Benjamin Netanyahu revealed that the ceasefire and hostage deal is ‘not close’.**

Speaking on a morning show, Prime Minister Netanyahu stated that a hostage deal was ‘not a deal in the making,’ as the red lines ‘have become redder.’

#### **The Israeli finance minister is planning 2025 spending cuts to fund Gaza War.**

Israeli Finance Minister Bezalel Smotrich announced on 3<sup>rd</sup> September that there would be significant spending cuts in the 2025 state budget as part of efforts to sustain the Gaza conflict. Under pressure to outline fiscal policies, Smotrich has rejected the idea of raising taxes during wartime. The budget is expected to be presented for cabinet approval in early October, with an initial parliamentary vote in mid-November, and a full approval by the end of December. This conflict, Israel's longest and most costly to date, has already cost Israel between \$45 and \$68 billion. Smotrich asserted that funding for the war effort would continue unabated until victory is achieved.

#### **Mass protests in Tel Aviv, Jerusalem, and Caesarea continued through 5<sup>th</sup> September.**

The protesters continued to call on Netanyahu’s government to reach a ceasefire deal to bring home Israeli hostages captured by Hamas. These protests, which began on 1<sup>st</sup> September, were prompted by the discovery of six deceased hostages. Many Israeli civilians continue to pressure Benjamin Netanyahu as they blame him and his administration for the continued war in Gaza.

These protests progressed on 5<sup>th</sup> September, with approximately 300 Israeli civilians marching from Habima Square in Tel Aviv to the IDF’s headquarters on Begin Street to demand a hostage deal. The protesters carried 27 mock coffins to represent the 27 Israeli hostages who have been killed in captivity.

#### **Israeli Defence Minister Yoav Gallant declared that Israel must destroy Palestinian militias in the West Bank.**

This statement, given on 4<sup>th</sup> September, concluded that the ongoing counter-terrorism operations in the West Bank are ‘mowing the grass’ which would lead to an eventual full-scale operation in the areas of Jenin, Tubas, and Tulkarm as they are deemed to be hubs for Palestinian militant cells.



## Operational

### *Israel and the Palestinian Territories*

#### **The polio campaign continued into its third day and concluded in the central Gaza Strip.**

Both Hamas and the IDF had agreed to a daily eight-hour pause in fighting in areas of the Gaza Strip. Despite this, the IDF killed at least 35 Palestinians across Gaza despite the temporary humanitarian pause taking place. The World Health Organisation (WHO) announced that it was ahead of its target for administering polio vaccinations in Gaza. By the end of the campaign in the central Gaza Strip on 3<sup>rd</sup> September, the WHO confirmed that the vaccine was administered to 189,000 children under the age of ten, within the three-day period.

As of 4<sup>th</sup> September, preparations were underway to begin the next phase of the vaccination campaign conducted in southern Gaza from 5<sup>th</sup> until 8<sup>th</sup> September. Following this, the third and final phase of the vaccination campaign will take place in northern Gaza from 9<sup>th</sup> until 11<sup>th</sup> September.

### *Regional*

#### **Some airlines have made flight amendments on flights to the Middle East.**

Lufthansa Group resumed flights to Tel Aviv on 5<sup>th</sup> September, while flights to Beirut remain suspended until 30<sup>th</sup> September; flights to Amman and Erbil were resumed on 27<sup>th</sup> August. Air Algerie has indefinitely suspended flights to and from Beirut. KLM has suspended flights to and from Tel Aviv until 26<sup>th</sup> October. Air France resumed flights to Tel Aviv on 27<sup>th</sup> August. Transavia has cancelled flights to and from Tel Aviv until 31<sup>st</sup> March 2025 and to Amman and Beirut until 3<sup>rd</sup> November. EasyJet plans to resume flights to Tel Aviv on 30<sup>th</sup> March 2025. Ryanair has cancelled flights to and from Tel Aviv until 30<sup>th</sup> September. Please note – this list is not exhaustive.

## **Assessment & Forecasting**

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#### **Netanyahu's press conference, featuring a map without the West Bank, will likely anger Palestinian militant groups, with a credible risk of an increase in terrorist attacks in the West Bank.**

It is likely to anger the newly appointed head of Hamas, Yahya Sinwar, who has a hardline determination to force the Israeli government into accepting Palestinian statehood. The erasure of the West Bank as an occupied Palestinian Territory illustrates the diametrically opposed perspectives between Israel and Hamas. The press conference has likely added to the tensions between Israeli and Hamas negotiating delegations. The signing of a ceasefire deal within the upcoming two weeks could be interpreted as Hamas allowing Israel to erase the West Bank from the occupied Palestinian Territories. Ceasefire negotiations are likely to be further disrupted by the 2<sup>nd</sup> September press conference.

## **The closure of Ben Gurion Airport underscores the operational disruption caused by the ongoing regional tensions.**

The ongoing regional flight disruption will likely be amended once a retaliatory attack on Israel has occurred, and the trajectory of the conflict becomes clearer. However, certain airlines are unlikely to resume operations due to low risk appetites and the cancellation of flights to airports in the region unless a formal ceasefire deal is signed.

The brief suspension and cancellation of flights from Ben Gurion Airport (TLV) following Israel's pre-emptive strike against Hezbollah on 25<sup>th</sup> August makes it highly likely that another large-scale cross-border missile exchange would lead to the temporary closure of airspaces in Israel and Lebanon.

## **Both Iran and the Houthis have signalled that their retaliatory strikes are forthcoming, with expectations set for the next two weeks.**

Following Hezbollah's 25<sup>th</sup> August attack, which deliberately avoided civilian areas and key infrastructure like Ben Gurion Airport (TLV) in Tel Aviv, it is expected that Iranian and Houthi retaliations will follow a similar pattern. These strikes will likely focus on demonstrating deterrence capabilities rather than causing widespread civilian or infrastructural damage.

Iran has continually signalled its intent to carry out a retaliatory strike. The retired Iranian military officer Esmail Ahmadi-Moghaddam declared on 2<sup>nd</sup> September that keeping Israel in a state of anxiety is 'no less than a military strike,' and that Iran would have a 'wise reaction' for the assassination of Ismail Haniyeh. This aligns with previous statements from Iranian officials suggesting that Iran aims to both retaliate and keep Israel on edge while planning its response.

A senior Islamic Revolutionary Guard Corps (IRGC) Quds Force Commander reiterated Iran's support for Hamas' negotiation conditions on 1<sup>st</sup> September. This suggests that Iran might opt not to retaliate against Israel if a ceasefire deal is signed. This would allow Iran to take credit for the actions of its proxy groups, such as Hezbollah's retaliation on 25<sup>th</sup> August, while avoiding international condemnation and the risk of escalation from carrying out a large-scale attack.

## **Iran's retaliation towards Israel is likely to be an indirect attack.**

We assess that Iranian retaliation will manifest in a more indirect manner compared to that of Hezbollah's attack on 25<sup>th</sup> August which struck Israeli territory directly with missile strikes. Rather, Iran will likely assess that a retaliation cannot be as insignificant as that in April and will be inclined to favour a direct assassination of an Israeli political figure or an attack on Israeli assets in other countries. Despite this, it is highly unlikely Iran has the capability to conduct a targeted attack within Israeli borders.

## **The truce allowing polio vaccinations reaffirms Israel's dominant position at the negotiation table.**

The temporary truce deal highlights that both Hamas and Israel can reach agreements. While the truce may appear to be a step forward, it underscores that Israel holds the majority of power in these negotiations. The deal was heavily contingent on Israel's approval and was reportedly granted only after 'intense pressure' from UN officials and the US Secretary of State Antony Blinken. Furthermore, the vaccination programme is authorised to proceed only in coordination with the IDF.

## **The West Bank military operation is likely to benefit Hamas in the long-term.**

The military operation that began on 28<sup>th</sup> August has resulted in Israel now engaging in active conflict on three fronts—in the Gaza Strip, along its northern border with Lebanon, and in the West Bank. Hamas's newly appointed leader, Yahya Sinwar, known for his hardline stance on Palestinian statehood, is likely determined to escalate a multifront war against Israel, as this strategy stretches the IDF across a broader, less concentrated area. Consequently, Sinwar may be inclined to reject a hostage deal, as this not only provides Hamas with military advantages but also allows the group to maintain the upper hand in further fragmenting Israeli society.

## **Iran is likely to have gained valuable insights from Hezbollah's retaliation against Israel on 25<sup>th</sup> August.**

With confirmation that Hezbollah's response was not the only planned retaliation for the assassinations of Fuad Shukr on 30<sup>th</sup> July and Ismail Haniyeh on 31<sup>st</sup> July, the probability of a similar Iranian strike has increased. This retaliation is expected to involve drone and missile attacks. The Houthi group has yet to execute its promised retaliation against Israel for the 20<sup>th</sup> July attack on Hudaydah Port. The Houthi Political Bureau has reaffirmed that a response is imminent. Like Hezbollah's retaliation, the Houthi strike is expected to precede Iran's and serve as a reconnaissance mission. However, it is crucial to note that Iran and its allies remain committed to ensuring that any retaliatory actions do not cross Israel's red lines and escalate into a full-scale regional war.

## **The ongoing back-channel negotiations are expected to continue largely unaffected by the retaliatory exchanges between Iran, its allies and Israel.**

Hezbollah's actions have increased pressure on Israel to agree to a ceasefire and hostage deal. According to Hassan Nasrallah, the timing of Hezbollah's retaliation was partially influenced by the ongoing negotiations, as the group sought to allow space for diplomatic efforts in Doha and Cairo. The retaliatory attack, however, will not impede ceasefire negotiations, as Iran and its allies have made it clear that retaliatory attacks should be treated separately from ceasefire talks.

## **The decision for schools in northern Israel to begin the academic year remotely on 1<sup>st</sup> September indicates that Israel does not anticipate regaining full security in the region in the near future.**

The education minister Yoav Kisch's announcement suggests that Israel views the insecurity in its northern regions as a long-term issue. Even in the event of a successful ceasefire deal, Israel is likely to continue viewing Hezbollah as a significant threat, necessitating a sustained high-security presence along its northern border. For Israel to feel secure enough to allow civilians to return to the north, Hezbollah would need to be pushed back significantly, beyond the Litani River.

## **The IDF lacks the current capabilities to intensify operations in the Gaza Strip and on its northern border.**

Defence Minister Gallant's declaration that the IDF has defeated the Rafah Brigades, and that the new important direction is 'to look north now' highlights the IDF's strategic focus on both the Gaza Strip and the Lebanese border area. However, the IDF's current capabilities are insufficient to intensify operations on both fronts simultaneously.

## **Hezbollah is provoking Israel while simultaneously trying to deter an Israeli invasion.**

Hezbollah is aware of the increasing pressure on Israeli leaders and is likely more inclined to carry out a large-scale retaliatory attack in the hopes that Israel will refrain from invading southern Lebanon. Despite its provocations, Hezbollah likely believes that its sophisticated and extensive missile arsenal, estimated at around 150,000 projectiles, coupled with its threats to target civilian infrastructure in Haifa and the northern districts, will serve as a strong deterrent against an Israeli invasion, as the pre-7<sup>th</sup> October status quo is more favourable to Hezbollah.

## **Escalations since 27<sup>th</sup> July have made it more likely that Israel and Hezbollah will engage in more direct conflict.**

Following the deaths of Fuad Shukr on 30<sup>th</sup> July and Ismail Haniyeh on 31<sup>st</sup> July, the likelihood of a large-scale retaliatory strike by Hezbollah has increased. In the scenario that a ceasefire is not agreed, Hezbollah will be highly motivated to conduct a retaliatory strike against Israel that will highlight its capabilities and restore its supporters' trust. The video footage illustrating Hezbollah's underground tunnel network, with both English and Hebrew subtitles, as well as the multiple speeches reiterating that a strike against Israel is imminent, highlight this intent. If a strike, larger in scale and causing more civilian casualties (i.e. more than 25 deaths) were to occur, then it is highly likely that Israel would need to carry out a major operation against Hezbollah to establish security on its northern border. This would initially be in the form of air/missile strikes against critical military and civilian infrastructure throughout Lebanon, and likely followed by a ground operation to push the militant group beyond the Litani River.

## **Hamas' statement to continue with suicide attacks indicates a shift in tactics.**

The bombing carried out on 18<sup>th</sup> August in Israeli territory was the first claimed by Hamas since 2008, signalling a possible strategic pivot due to the heavy losses suffered by Hamas since the conflict began on 7<sup>th</sup> October 2023. According to IDF reports, Hamas' long-range rocket supplies are depleting, which might force the group to rely more heavily on suicide bombings targeting Israeli civilian centres. However, Israel's enhanced security measures, developed over the last few decades, are likely to mitigate the effectiveness of these attacks.

## **The planning of a retaliatory attack is proving to be divisive within Iranian politics.**

Iranian president Masoud Pezeshkian has revealed he intends to avoid a harsh response that could trigger an all-out war or escalate tensions even further. On the other hand, the IRGC, under the ordering of Supreme Leader Ali Khamenei, seeks to 'harshly punish' Israel after the assassination of Hamas leader Ismail Haniyeh in Tehran on 31<sup>st</sup> July.

## **The upcoming IDF transition to a new, less intensive phase likely indicates a shift to longer-term IDF counter-insurgency operations in Gaza.**

Following the completion of the Rafah operation, likely at some point over the coming weeks, the IDF will likely maintain some forces near the Egyptian border and along the Israeli-imposed Netzarim corridor south of Gaza City. By controlling both locations, the IDF can cut Hamas supply routes from Egypt while separating northern-based militants from their command-and-control centres in Rafah and Khan Younis. However, the continued resurgence of Hamas militancy in central and northern Gaza highlights the difficulty of fully defeating Hamas. Unless a new political structure complemented by a non-Hamas security force is established in Gaza,

Israel will likely have to commit to continued counter-insurgency operations in the territory.

### **Returning security to its northern border is a priority for Israel's political leaders.**

From the Israeli perspective, the status quo, in which thousands of northern residents are internally displaced due to Hezbollah's military activity, cannot continue. With fading public confidence in the ability of Israel to provide security for Israel's citizens, the future of the current political and military leaders depends on an effective resolution to the security dilemma posed by Hezbollah. Any resolution acceptable to Israel would have to include the withdrawal of Hezbollah's elite Radwan Forces beyond the Litani River in southern Lebanon. Without this withdrawal, Israeli leaders will unlikely be able to convince its population that the security environment has improved to the extent that civilians can return to their homes in border areas.

### **Israel likely assesses that a military campaign to ensure a Radwan withdrawal is preferable to a ceasefire agreement.**

Israel faces both military and diplomatic options to secure Hezbollah's withdrawal of its Radwan forces beyond the Litani River. The diplomatic pathway would likely see a ceasefire agreement requiring concessions to Hezbollah in exchange for Radwan's withdrawal. Such concessions would strengthen Hezbollah's strategic position, allow Hezbollah to present its nine-month campaign as a victory over Israel, and embolden Hezbollah to recommence cross-border attacks when it needs to deter or coerce Israel in the future. The cost of a military campaign for Israel would be significant both in terms of loss of civilian and military life in the immediate border area and damage to the economy. However, if Israel can inflict significant medium-to long-term damage to Hezbollah's military capabilities while forcing a Radwan withdrawal, then it would gain a strategic advantage and restore deterrence against its long-term foe. Even if fighting in southern Lebanon comes to a standstill, Israel would likely be in a much stronger position vis-à-vis Hezbollah when it comes to ceasefire negotiations post conflict.

### **The Israeli political and military leadership continues to pursue their stated objective of targeting senior Hamas officials despite the ongoing ceasefire negotiations.**

Further successful assassinations of key Hamas leadership figures are likely to jeopardise present and future ceasefire negotiations and lead to further escalation of the conflict. The assassination of Ismail Haniyeh on 31<sup>st</sup> July has already sparked widespread condemnation and vows of retaliation from Iran and its Axis. Another assassination would likely increase the chances of a large-scale retaliatory strike in the near future.

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