

# INDICATOR INSIGHT BRIEF: ISRAEL – HEZBOLLAH ESCALATION

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## Indicator

There has been a significant increase in military and political activity in northern Israel, on the border with Lebanon. On 26 June 2024, Israeli media confirmed open-source reports of forces transferring from the conflict in Gaza to the northern border. There are now reportedly more forces under the Northern Command than there have been at any time since October. Two Israeli brigades, based in the north, have recently carried out exercises simulating fighting in Lebanon. This military activity was accompanied by a two-day visit to northern Israel by President Isaac Herzog. After meeting with community and military leaders, he warned: “The international community cannot act surprised if the situation spirals out of control, as the international community has almost done nothing to contribute to the full security of the residents of Israel, despite repeated violations of treaties and international agreements from Lebanon by Hezbollah.”

## Context

The Israel Defence Forces (IDF) are drawing down troop levels in Gaza, but the length of military operations is indeterminate. On 23 June, Prime Minister Benjamin Netanyahu announced that the ‘intensity’ of combat activity in the Gaza Strip would lessen, enabling the transferral of forces from Gaza to the north. According to Israel’s Defence Minister, Yoav Gallant, the IDF was set to implement “Phase C” in the Gaza Strip. “Phase C” entailed low-intensity clearing operations by the IDF to eliminate remaining pockets of Hamas fighters. Gallant and Netanyahu highlighted that this move and Israel’s willingness for a “pause in operations” did not mean the end of the war. Netanyahu reiterated that “the war will not end until [Hamas] is destroyed.”

Following Hamas’ attack on Israel on 7 October 2023, and Israel’s incursion into the Gaza Strip, Israel has engaged in limited regional exchanges of fire with Hezbollah in Lebanon and other Iran-backed “Axis of Resistance” groups which vowed to combat Israel as long as operations against Hamas and the Gaza Strip continued. Consequently, the Israel-Lebanon border has experienced a persistent exchange of fire between Hezbollah and Israel. It was reported in May that more than 60,000 Israeli residents in northern communities had been displaced by the near-daily attacks.

## Analysis

There are few near-term indicators that Israel and Hamas will reach a ceasefire agreement. Hezbollah would likely respect such an agreement; Hezbollah largely respected the November ceasefire. It is unlikely that Hezbollah wants a full-scale conflict with Israel. Its Secretary-General, Hassan Nasrallah, has claimed that the current intensity has resulted in success, citing the displacement of Israelis as evidence. War is not inevitable. Israel is attempting other means to reassure citizens and entice them back to the north through financial support, but war is assessed to be increasingly likely. Israel is increasing its military readiness to deter Hezbollah, and with the conflict in Gaza decreasing in intensity, it may now concentrate forces in the north. It is far from clear that the mere presence of greater forces will deter Hezbollah.

## Implications

Ambrey has assessed that a conflict between Israel and Hezbollah would significantly escalate the risk to shipping, particularly in Haifa, Beirut, and offshore installations. Hezbollah has a weapons arsenal of a different order of magnitude to Hamas. They have also proven their capability to infiltrate Israeli air space. In a war, Hezbollah may also opt to target shipping or port facilities directly to disrupt Israeli trade. Hezbollah has previously targeted offshore platforms with missiles and UAVs. The “Islamic Resistance” in Iraq and Syria have announced their intent to increase operations if Israel were to invade Lebanon too. This week, several countries have advised their citizens to leave Lebanon, and the US has been one among several to consider evacuation plans. Shipping calling Israel and Lebanon is advised to assess contingency plans and to seek regular updates on the situation.