Escalation in the Middle East

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Executive Summary

On September 20, 2024, Israeli airstrikes targeted Hezbollah's operations commander Ibrahim Aqil in Beirut, killing 14, including senior commanders, and injuring 66. Earlier, on September 17-18, rigged communication devices exploded across Lebanon, killing 37 and injuring over 3,000, breaching Hezbollah's security. Hezbollah leader Hassan Nasrallah condemned the attacks, calling them potential war crimes, while Israel shifted its military focus northward. Lebanon's prime minister criticized the strikes, urging the UN to address the "technological war." The conflict risks escalating into a broader regional conflict.

Timeline of Escalation

Tuesday, September 17, 2024

- Multiple **Pager explosions** targeting Hezbollah members occurred across Lebanon and Syria. Explosions killed 12 and injured over 2,750, including civilians and Hezbollah members.
- Hezbollah accused Israel for the pager explosions, which also injured the Iranian ambassador to Lebanon.

Wednesday, September 18, 2024

- Explosions caused by **rigged walkie-talkies** in Lebanon killed at least 25 and injured 708 people, including 20 Hezbollah members.
- Hezbollah launched rocket attacks on Israeli positions in response.

Thursday, September 19, 2024

- Hezbollah fired anti-tank missiles at Israeli positions, killing two soldiers and injuring others.
- The Israeli Air Force (IAF) conducted over 70 airstrikes targeting Hezbollah infrastructure in southern Lebanon.

Friday, September 20, 2024

- Hezbollah launched 120 rockets into northern Israel.
- Israeli airstrikes targeted Hezbollah's operations commander Ibrahim Aqil in Beirut, killing 12 people and injuring 66.

Incident Analysis

Analysis of the Pager Explosions:

On September 17, 2024, at 1530 Hrs local time, Lebanon witnessed an attack targeting Hezbollah members through booby-trapped pagers that detonated almost simultaneously across various locations. The explosions **killed 12 people and injured 2,750**.

- Paging devices that were used for the attacks were manufactured by the Taiwanese company Gold Apollo and distributed through a Hungarian-based intermediary, BAC Consulting. Both companies have denied any involvement.
- This raises questions on how the devices were compromised and weaponized, further pointing towards a potential breach in the distribution chain during or after the manufacturing process of the pagers.

Areas Affected:

- **Beirut's Southern Suburbs**: Multiple explosions targeted key Hezbollah strongholds.
- **Bekaa Valley:** Including Baalbek and Western Bekaa, several blasts occurred in this region, which is a known Hezbollah support base.
- **Southern Lebanon**: Towns such as Saida, Sour, Nabatieh, and Marjayoun were impacted, with widespread panic reported near the Israeli border.
- **Syria:** Explosions were also reported in Damascus and Rif Dimashq, indicating a cross-border dimension to the attacks.

Analysis of the Walkie-Talkies Explosions:

The following day, on **September 18, 2024, at 1700 Hrs local time**, a second wave of attacks took place using rigged walkie-talkies that **killed 25 and injured 708**.

- The walkie-talkies involved in the second attack were identified as the IC-V82 model from the Japanese company ICOM, a product that was discontinued in 2014.
- ICOM has indicated that the devices used were likely counterfeit, as they had not been supplied through any recognized agent or vetted by security services.
- This suggests that these devices were either modified or replicated outside the official supply chain.

Areas Affected:

- Funeral Procession, Southern Beirut: Targeted explosions during a funeral gathering resulted in significant casualties.
- Beirut's Southern Suburbs and in the neighbourhoods of Haret Hreik and Dahiyeh.

LOCATIONS OF THE PAGER AND WALKIE–TALKIE EXPLOSIONS

Analysis of the Israeli Strike (20 September, 2024)

Another deadly attack occurred on September 20, 2024, when the Israeli military claimed to have **killed Hezbollah military official Ibrahim Aqil and around 10 commanders from Hezbollah's elite Radwan Force** in a strike on southern Beirut.

- The strike targeted a residential building in the Dahya neighborhood, allegedly used as a base for coordinating attacks on Israeli civilians and soldiers.
- The Lebanese government condemned the strike and called for an emergency UN Security Council meeting, accusing Israel of actions "akin to genocide."

Areas Affected and Damage:

- **Dahieh Area:** Primary target, a densely populated southern suburb of Beirut and a Hezbollah stronghold. Multiple buildings, including residential and commercial structures, were heavily damaged.
- Rubble and Collapse: At least one residential building collapsed, with reports of individuals trapped under the debris.
- Critical Infrastructure: Possible impact on local infrastructure, including power and communication networks.
- Road Closures and Access Restrictions: Hezbollah members closed off several streets, restricting access to the affected zones for security reasons.

Geopolitical Risk Analysis

The Shift of Conflict to Northern Israel and Southern Lebanon: The conflict between Israel and Lebanon's has intensified significantly this week..

- **Implications for Israel:**
    - **Military Strategy**: Israel may need to reallocate most of its military resources to the northern front, potentially impacting its overall defense posture. Israel's defense minister Yoav Gallant says the military is diverting resources to the north where the war's "centre of gravity" has shifted.
    - **Border Security**: Increased security measures and mobilization of troops along the border are expected to counter Hezbollah's activities.
- **Implications for Lebanon:**
    - Hezbollah's involvement, now centered on the northern border, could lead to high military engagement and potential civilian casualties in southern Lebanon.
    - **Civilian Impact:** The escalation risks severe disruptions in civilian life, including displacement and infrastructure damage in border regions.
- **Regional Stability:**
    - Risk of Wider Conflict: The escalation could trigger a broader regional conflict, involving other actors along with Hezbollah and Israel and potentially destabilizing neighboring countries.
    - Security Dilemma: Both sides are likely to strengthen their military postures, increasing the risk of miscalculation and escalation.

Role of the Axis of Resistance

Hezbollah's Position and Capabilities:

- **Role within the Axis:** Hezbollah is a key player in Iran's Axis of Resistance, coordinating with allied groups across Gaza, Yemen, Syria, and Iraq.
- **Military Capabilities:** Hezbollah is considered the most powerful non-state militia in the region, heavily armed, trained, and funded by Iran. Despite recent setbacks due to Israeli attacks on its command networks, it remains a formidable force.

The recent infiltration of Hezbollah's critical command infrastructure has compromised its strategic position. With 37 casualties and over 3,000 wounded, Hezbollah's credibility as Iran's leading proxy is under threat. However, it has vowed a strong retaliation, indicating potential escalatory actions.

Iran's Influence and Support:

- Potential Reactions: Iran, through its Revolutionary Guard Corps, has indicated a "decisive and crushing response" from the Axis of Resistance, highlighting a high risk of regional escalation.
- Iran's involvement could either bolster Hezbollah's position or lead to a broader conflict if the situation escalates further.

Other Allied Groups:

- Coordination Among Allies: The Axis of Resistance, comprising groups like Syria's militias, Iraqi factions, and Yemen's Houthis, has increased coordination post–October 7 attacks.
- Potential Actions: Any coordinated response from these groups could widen the conflict, challenging regional stability and potentially drawing in more actors.

Iran-backed groups in the Middle East

The Changing Nature of Warfare

The recent use of pagers and walkie-talkies in the Lebanese conflict highlights the evolving nature of **asymmetric warfare.** These unconventional methods disrupt not only communication but also strategic operations, with sophisticated targeting of supply chains and logistics. Conducted on such a large scale, these tactics pose a grave risk if employed more widely.

While Israel has previously targeted supply chains and communications to weaken adversaries without direct confrontation, the September 17-18 attacks stand out for their timing and scale. Conducted during an ongoing war with Hamas, which began on 7 October 2023, these operations targeted Hezbollah amidst an active conflict. Despite Israel's lack of official statements, the attacks, aimed at Hezbollah fighters, also resulted in significant civilian casualties. This highlights the heightened risks and complexities of employing large-scale asymmetric tactics in such a volatile environment.

Why Pagers and Walkie-Talkies? Hezbollah's reliance on older communication devices like pagers is an attempt to evade advanced surveillance technologies. However, this strategy appears to have backfired, as these devices have now become targets themselves.

Global Implications: This type of warfare extends beyond the Middle East, posing a threat to global supply chains and critical infrastructure. Similar tactics could disrupt logistics and operations worldwide, signalling a shift in conflict strategies towards more covert and disruptive methods.

Missile Threats and Military Escalation

- Hezbollah has a substantial arsenal, including **missiles with a range of up to 500 km**, capable of reaching deep into Israeli territory.
- Israel's Iron Dome air defense system offers robust protection; however, a large-scale **saturation attack by Hezbollah** could potentially overwhelm these defenses, leading to significant damage and civilian casualties.
- Hezbollah claims to have over 100,000 fighters and reservists, while independent estimates suggest a force size between 30,000 and 50,000 troops.
- Israel's military is significantly more advanced and larger, both in technology and manpower.
- Despite the military imbalance, Hezbollah could utilize **asymmetric warfare tactics**, including guerrilla operations and missile strikes, which **pose a continuous high risk**.
- Iran's involvement in the conflict, especially following threats of retaliation for attacks that injured their envoy, adds a dangerous dimension. Any direct military response from Iran could escalate the conflict further, potentially involving other regional actors and exacerbating the situation.

International Responses

United States: Expressed concern over the conflict's escalation and emphasized avoiding a second front on the Israeli-Lebanese border.

United Nations warns of escalating horror in Middle East as 'communications tools become weapons'

Regional Actors:

- **Lebanon and Hezbollah**: Hezbollah vowed retaliation for Israeli airstrikes that killed senior commander Ibrahim Aqil, increasing fears of a wider conflict. Lebanese authorities are concerned about the well-being of civilians on the border.
- **Iran:** Condemned Israeli actions, particularly after its envoy was injured. **Iran indicated its willingness to respond,** raising the risk of further regional escalation involving Iranian-backed groups.

Historical Analysis: Israel's Covert Operations

Israel has a long-standing history of conducting covert operations aimed at disrupting the capabilities of groups like Hezbollah and weakening their influence in the region.

- **1996:** Yahya Ayyash, a top Hamas bombmaker known as "The Engineer," was killed by a booby-trapped cellphone in Gaza, marking the beginning of Israel's use of targeted assassinations and use of advanced technology.

- **2000:** Samih Malabi, a senior Fatah member, was killed by an explosive device planted in his cellphone near the Qalandiya refugee camp.

- **2007**: Stuxnet, a computer worm reportedly developed by Israeli and U.S. intelligence, targeted Iran's nuclear facilities, disrupting their operations.

- **2020:** Iranian nuclear scientist Mohsen Fakhrizadeh was assassinated by a remotely controlled machine gun in Iran, attributed to Israeli operatives. This attack was part of Israel's strategy to thwart Iran's nuclear ambitions.

- **July 2024**: Fuad Shukr, a senior Hezbollah commander, was killed in a targeted airstrike in Beirut. This operation was part of a series of strikes aimed at reducing Hezbollah's operational capabilities.

- **17-18 September 2024**: A series of pager and walkie-talkie explosions targeted Hezbollah members across Lebanon, killing dozens and injuring thousands. This unprecedented attack disrupted Hezbollah's communications and indicated deep infiltration into their network.
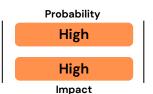
Potential Repercussions:

- **High Risk of Escalation**: Continued covert operations could provoke retaliation from Hezbollah, risking a wider regional conflict involving Iran and other actors. Such escalations have the potential to spiral into a **full-scale war, similar to the 2006 conflict**.

- **Diplomatic Impact**: These actions may complicate ongoing ceasefire negotiations mediated by the U.S., Qatar, and Egypt, potentially **prolonging the conflict**. Elongation of the conflict may cause further displacement and civilian casualties in both Lebanon and Israel.

Risk Assessment

Trade and Mobility Disruptions
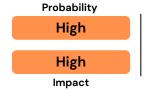
Probability

High

High

Impact

- The affected areas, as previously mentioned in the report will likely experience increased security and, transport and business disruptions. Further **cross-border violence is likely in the short term.**

- Given the intensity of the recent exchanges and the retaliatory nature of the conflict, the **probability of further disruptions is high**. Hezbollah's ongoing capability to launch missiles into Israel poses a continuous threat to trade and mobility in the region.

- If the conflict expands, the disruption could spread to neighboring countries, further impacting the Eastern Mediterranean, a critical passage for international trade. This could lead to a significant **bottleneck for global shipping and increased costs** across various sectors.

Advice:

- Avoid impacted areas until authorities provide an all-clear.
- Follow all instructions from local authorities.
- Avoid nonessential travel to Lebanon and Israel
- Consider leaving Lebanon via commercial flights while they are still available. Be aware that commercial travel options in Lebanon may become increasingly limited if the security situation worsens.

Emergency Services Disruptions

Probability

High

High

Impact

- Debris from collapsed buildings and damaged vehicles is impeding the movement of ambulances and rescue teams, delaying critical response times, in Lebanon.

- Hospitals are operating at full capacity, struggling to manage the overwhelming number of casualties with limited resources and staff.

- Limited availability of hospital beds and medical resources, especially in Beirut, due to the high number of casualties and ongoing conflict.

- Routine medical care severely disrupted, with priority given to emergency trauma cases.

Israel–Lebanon Border Region Impacts

- **Military Presence and Escalation:**
  - Israel has deployed its 98th Division, including commando brigades, to northern Israel to strengthen defense against Hezbollah, shifting the conflict's center of gravity to the northern border.
  - Southern Lebanon remains heavily militarized by Hezbollah, which has established rocket launchers and other military infrastructure close to civilian areas, increasing the risk of collateral damage.

- **Displacement and Civilian Impact:**
  - Approximately 60,000 residents from northern Israel and several communities in southern Lebanon have been displaced due to continuous cross-border attacks.
  - Constant threat from rocket and drone attacks has turned 43 Israeli communities near the border into "ghost towns," with only essential personnel and military remaining.
  - As the conflict shifts to northern Israel, there is a high likelihood that the situation could worsen.

Advice for Citizens in Border Regions:

- Remain Alert and Evacuate if Necessary: Stay informed and be prepared to evacuate at short notice. Follow instructions from local authorities and use designated safe zones.
- Minimize Exposure: Limit outdoor activities and avoid areas near the border to reduce exposure to potential attacks.

Advice for Travelers:

- Avoid Non-Essential Travel: Refrain from visiting northern Israel and southern Lebanon until the situation stabilizes.
- Stay Updated: Monitor travel advisories and local news for the latest updates on the security situation. Adjust travel plans accordingly.

Internal Political and Social Instability in Israel
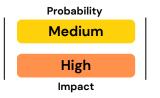
Potential Internal Disruptions:

- **Increased Anti-Government Protests:**
  - Large-scale protests triggered by the government's handling of the hostage situation in Gaza.
  - Probability: Medium to High; Mass protests have been renewed in Israel in the past weeks after the bodies of six captives were recovered from Gaza. An estimated 750,000 people attended the rally.
  - Severity: High; potential for civil unrest in major cities, impacting daily life.

- **War Fatigue and Social Frustration:**
  - The IDF is operating to bring security to northern Israel in order to enable the return of residents to their homes, as well as to achieve of all of the war goals.
  - Residents in northern Israel, affected by ongoing conflict, may resist further military engagement.
  - Probability: Medium; prolonged instability could lead to demands for peace.
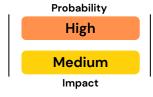 - Severity: Medium to High; potential for localized resistance and civil disobedience.

- **Impact of Dual-Front War:**
  - Government faces challenges managing conflicts on Gaza and Northern fronts.
  - Probability: Medium to High; public dissatisfaction may increase with perceived government inaction.
  - Severity: High; political instability could escalate, affecting overall governance and security.

Probability

High

High

Impact
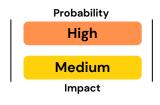
Civil Unrest and Public Safety Threats in Lebanon

- High likelihood of demonstrations, sectarian disputes, and localized violence across Lebanon, with minimal warning.
- Avoid large gatherings, protests, and areas of military activity. Maintain a low profile and be prepared for potential disruptions in communication and transport.

Probability

High

Medium

Impact

Transport Disruptions– Air travel

- Risk of sudden flight cancellations due to escalating conflict and attacks in the region.
- Increased likelihood of airspace restrictions around Beirut due to ongoing military operations.
- Reduced availability of commercial flights as airlines may halt operations, disrupting travel plans.
- Potential for attacks targeting airport infrastructure, posing risks to travelers.
- Foreign nationals advised to leave while flights are still operational to avoid being trapped.

Probability

High

Medium

Impact

Business and Utility Disruptions

- Frequent power outages and infrastructure damage will possibly disrupt business operations and essential services.
- Telecommunications interruptions may impact business communications and emergency response.
- Delays in goods transportation might take place due to roadblocks and damaged infrastructure.
- Temporarily reduced economic activity.

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