



RiskIntelligence

# Client notice: Israeli offensive in Lebanon

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## Introduction

As Israel has launched a ground operation in southern Lebanon, this document provides answers to some of the most important questions in relation to commercial maritime operations.

- What are the Israeli military's intentions?
- Where will the Israeli armed forces advance?
- How will Hezbollah react?
- Will Iran react at the maritime level?
- What is the impact on the maritime security environment?

The document has been written with events still in motion, and the situation may change in the short term. However, some aspects remain valid despite the recent escalation and are still relevant in guiding the response of maritime operators.

Date and time of the last intelligence used in this report: 2 October 2024, 06:00 UTC.

## 1. What are the Israeli military's intentions?

Israeli intentions are uncertain. Formally, the attack on Lebanon is presented as an act of self-defence with the claimed goal of allowing the return of roughly 80,000 internally displaced persons (IDPs) to their residences in northern Israel.

Securing the IDPs' return militarily requires the disarming of Hezbollah. However, this would require a deep penetration into Lebanon and into the Bekaa valley where supply lines from Syria and Iran arrive. Finally, parts of Beirut are a substantial Hezbollah stronghold and the city itself is an arrival point for supplies via its port and the Damascus Highway.

Among the Lebanese population and other observers, there are concerns that Israel seeks the occupation of southern Lebanon to create a buffer zone reaching at least until the Litani river. This creates fears about the potential displacement of upwards of one million Lebanese, about 20% of the country's entire population.

## 2. Where will the Israeli armed forces advance?

While it is impossible to predict Israeli military operations with any kind of certainty, it is likely that Israeli forces will advance into areas necessary to degrade Hezbollah capabilities. The Hezbollah presence stretches from southern Lebanon and the coastal area into the southern and eastern part of the country as well as into southern and eastern Beirut. Southern Lebanese ports and facilities are within this area. The ports of Tripoli and Beirut are outside this area.

However, the port of Beirut is widely assumed to be under Hezbollah control. The group conducts its business in the port, thereby placing it within the list of potentially relevant targets. The port facilities are likely to be the northernmost maritime targets for Israeli troops. These are important targets, but the presence of foreign (and allied) investments and assets may complicate military strikes and mitigate the amount of force used if such strikes are carried out.

Other ports such as Sidon, Zahrani and Tyr are within Hezbollah reach and located along the country's main coastal highway. Tyr, the country's southernmost port, is particularly exposed to military operations as it is located south of the Litani river.

### **3. How will Hezbollah react?**

Hezbollah is not expected to mount a substantial counteroffensive, having been significantly weakened by the Israeli campaign to date, as well as by its previous involvement in the Syrian civil war. Hezbollah is not expected to engage in a campaign of maritime or coastal strikes either.

Hezbollah's limited resources are likely to be directed towards attacking Israeli military assets. The group is unlikely to waste capabilities to target port facilities, knowing that Israel can reliably mitigate such strikes. Furthermore, Israel would likely attribute any escalation in the maritime environment to Iran, thereby potentially opening up another front which both have avoided so far.

Hezbollah has had two priorities in recent years: directing politics in Lebanon and – most importantly – securing Iran's access to the Mediterranean. These remain its priorities. To fund related activities, Hezbollah has relied on maritime trade. This ultimately has guided the group's efforts to perpetuate a constant instability in Lebanon, allowing it to freely engage in maritime trade, including for drug trafficking. Without regular access to shipping lanes, Hezbollah would no longer have the resources to act as the most significant actor in Lebanese politics, which is a vital aspect from the Iranian perspective.

### **4. Will Iran react at the maritime level?**

Iran and Israel have avoided a maritime escalation throughout the past year, aware of the limited strategic benefits and the high political costs with regards to allies. Its priorities and the incentives for its current restrained behaviour at sea remain the same as prior to the invasion. However, this does not preclude another direct attack on Israel using drones or missiles, similar to the Iranian attacks in April and during the evening on 1 October. The Iranian government may deem such attacks to be necessary to save face and demonstrate resolve.

Iran's priority in Lebanon will likely be to save Hezbollah's capacity to wield influence in Lebanon on "the day after". Fundamentally, the requirements for this are the military capacity to combat rival Lebanese militias and to generate income. Military resistance to an Israeli invasion is not a

fundamental requirement, yet such resistance may be necessary to ensure domestic – and regional – political influence. Even a degraded Hezbollah, however, will be a valuable proxy group for Iran.

### 5. What is the impact on the maritime security environment?

The targeting of Lebanese civilian infrastructure by Israel remains a distinct possibility for all port facilities in Beirut and further south towards the Israeli border. The potential of military strikes, however, is moderated by several factors which are particularly relevant for Beirut and northern ports. The most notable aspect is the involvement of foreign interests in Lebanon's maritime affairs. Striking economic facilities where companies from France, Germany, the United States, Turkey, Italy, China and others have conducted significant investments and where foreign nationals are likely to be present is a politically uncertain gambit.

Hezbollah can escalate its response and target maritime structures. So far, the group has chosen not to do so. The Israeli escalation certainly forces the Axis of Resistance – of which Hezbollah is a key part – to engage in some kind of response. At the same time, the escalation has not changed the nature and incentives of Hezbollah and Iran's government. Currently, Israeli maritime facilities are unlikely to be priority targets, although they may be exposed to collateral damage from nearby missile or drone strikes.

A strike against Israeli maritime targets could nonetheless be conducted by another group within the Axis of Resistance, for examples with drones launched from Syria and Lebanon against vessels in the vicinity of Israeli ports. This may also imply an increased aggressiveness by the Houthis towards targets in Israel.

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