

FDD Media Call: Hezbollah's Escalation on Israel's Northern Border

June 7, 2024

*Featuring Jonathan Schanzer, Richard Goldberg, David Daoud, and Hussain Abdul-Hussain
Moderated by Joe Dougherty*

DOUGHERTY: Greetings, we will get underway in about 30 seconds.

Good afternoon, and thank you for joining us for today's media briefing. My name is Joe Dougherty, senior director of Communications here at the Foundation for Defense of Democracies, a nonpartisan research institute focused on national security and foreign policy. We're grateful that you've taken the time to join us for a very timely briefing on the Hezbollah escalation with Israel and the potential for a significant escalation by Israel in response. Joining us on today's call are four Middle East experts from FDD, Jonathan Schanzer, FDD Senior Vice President for Research. He's the author of several books on the Middle East, including *Gaza Conflict 2021: Hamas, Israel and 11 Days of War*, which was the first book published about that war. Richard Goldberg, FDD Senior Advisor and Former Director for Countering Iranian Weapons of Mass Destruction for the White House National Security Council. David Daoud, FDD senior fellow focused on Lebanon and Hezbollah and Hussain Abdul-Hussain, Beirut-born FDD senior fellow focusing on Gulf relations with Iran and Gulf peace with Israel.

Some quick housekeeping before we get started. Today's conversation is on the record. We will share the transcript and recording from today's call within about 24 hours, hopefully sooner. Today's run of show is as follows. First, we'll hear from John who will set the scene followed by Richard, then David, then Hussain. We'll then open the call to your questions and during the Q&A portion, you may submit your questions via the chat feature or you may use the raise hand feature in which case we'll let you know when you've been unmuted and you can ask your questions a lot to address. Let's get underway with John. John?

SCHANZER: All right, thanks Joe. Thanks for joining. I will start actually by taking us back to October 7th and the immediate aftermath of the Hamas attack. It's not I think widely known, but the Israelis in the aftermath of that attack by Hamas in the south of Israel, the Israelis actually prepared to wage a war in the north. This was in fact the battle plan as it's been told to me by people who were in the room that the Israelis were actually thinking about striking Hezbollah in the north, primarily because Hezbollah began attacking Israel within 24 hours of the 10/7 attacks, and those attacks have not stopped since the numbers that are provided officially by the Israelis suggest that there's been somewhere around 4,100 to perhaps 5,000 different attacks. I think that number is higher. We have seen large numbers of sirens going off. I think it by now exceeds whatever has occurred in the South in terms of the penetration into Israeli airspace of drones and missiles and other projectiles.

David Daoud may have more information on that, but suffice it to say that this war that has been going on, and the Israelis don't call it a war, the U.S. doesn't call it a war. This has been going on since October 8th, and the result of this war has been that it has cleared out a hundred thousand or more residents of Northern Israel. There is effectively a DMZ on the Israeli side as well as on the Lebanese side of the border. Roughly the same number have been evacuated out of Southern Lebanon, but this has been the quietest of war zones in terms of coverage in the media, but perhaps the most dangerous. And when the Israelis were thinking about going in early on in the war, you may recall that President Biden actually visited Israel and he convinced the Israelis not to wage the war in the North.

The Israelis saw it as crucial to their security. I mean, in part because of the sheer number of attacks that had been recorded even early on, the number of attacks that Hezbollah had fired into Israel was enough to justify such a war. But also I think it bears noting here that Hezbollah is seen by the Israelis as the primary threat on their border. This is a well-trained force. It's fought alongside the Russian military. It's fought alongside the Iranian military. It has 200,000 plus projectiles in its possession right now that exceeds the number that Hamas contained at the beginning of the war by six or seven times. They have precision guided munitions. They have a military that has been broadly described as equal in strength to the average European military in terms of war fighting capabilities and hardware. This is the reason why the Israelis were so concerned and why they were considering that early that early war plan.



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President Biden convinced the Israelis to stand down in that respect. And you may recall we deployed naval assets to the region and for a time it appeared that Hezbollah was not fully deterred, but at least it was keeping a lid on escalation. In recent weeks, we have seen a significant escalation that we've seen in some cases a hundred percent increase or more in certain kinds of projectiles coming into Israel, drone attacks you may have actually seen footage that I posted on my Twitter/X account this morning where Hezbollah had video of a guided missile that was purportedly aimed at an iron dome installation in Northern Israel. Now as we understand it, that was actually not an Iron Dome installation, but perhaps a decoy. Regardless, they have these very advanced capabilities that have Israel's attention. We've seen a call-up of several hundred thousand troops to the northern border.

The Israeli commander of the Northern Command has said that his people are ready and that they are awaiting instructions from the chief of staff of the military and from the security cabinet of the Israeli government that if they give him the sign to go that he will. So we have actually never quite seen the buildup that we're looking at right now. Things are very tense along that northern border tense across the entire region. There's an effort underway, scrambling on the part of U.S. officials, European officials and others trying to prevent this war. And I'll just conclude with this, that if this war does break out my assessment, and I think this echoes that of what we hear from Israelis as well as from others in the region, this would be very likely the most devastating war that the region has ever seen, that the armaments that would be used by Hezbollah, some that have not yet even been made public, Some that I'm not aware of have Israeli war planners nervous. But I will tell you as well that the Israeli plans for neutralizing Hezbollah.

The plans that we've been hearing the Israelis talk about for years in the eventuality of such a conflict would leave Lebanon utterly devastated and not out of a desire to do so, but rather out of the need to protect Israel from the onslaught of precision and less precise missiles that Hezbollah has in its possession. There are so-called Radwan forces. There are special forces that have been preparing to invade Israel in the event of a war breaking out. So these are all things that we are watching right now. This is not a good moment for the region and obviously not a good moment for anyone hoping for things to return to a place of relative calm. But I will just maybe conclude with this. This is one front among many that has been activated by the Islamic Republic of Iran.

Hezbollah is their most powerful proxy. Of course, we're aware of some of the other proxies that have been fighting Israel. We could say that there's been a war so far on seven different fronts, whether it's Lebanon, West Bank, Gaza, Iraq, Syria, Yemen, and of course Iran itself. This has been a well-coordinated campaign being waged by the Islamic Republic of Iran. The escalation here is undoubtedly tied to direction being provided by the Islamic Republic to its most powerful proxy. That proxy answers to Iran without question, we've seen this in multiple different iterations where Hezbollah is subservient to the orders of the Islamic Republic, and so the problem may look like a localized one in Gaza. It may look like a localized one in Lebanon. It's not. This is a broader problem that is being stoked by the Islamic Republic and that ultimately is where the answers will lie when the guns fall silent. But for the interim, what we're watching right now is a very dangerous escalation on Israel's northern border. I'll hand it back to you, Joe.

DOUGHERTY: Thank you, Jonathan. Rich, over to you.

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GOLDBERG: Yeah, thanks. I think that was a great overview, and I'll pick up exactly where John just left off because I think it's a fundamental failure in U.S. policy at the moment. The Biden administration has for months now framed this entire regional conflagration as a Gaza war that is risking regional expansion, and they are working to contain and de-escalate so that what is going on in Gaza does not spread across the region. That's an entirely wrong frame because obviously we understand that this is a multi-front campaign that is waged and directed from Tehran. So if your policy at the top is not correct in how you are approaching Iran, the sponsor, the director, the orchestrator of multiple fronts, that's moving proxies at will based on the timing, based on the politics, based on the pretext, whatever the reasons are when they want Hezbollah to escalate based on what the U.S. might be doing, what Israel might be doing when they tell the Houthis in Yemen, okay, time to escalate when they're working with militias in Iraq or Syria in the West Bank, destabilizing Jordan. All of that is happening with Iran.

What is US policy towards Iran today? Sanctions relief. We continue to allow oil to freely flow from Iran to China without cracking down whatsoever. We've seen the explosion since last summer when the unacknowledged nuclear deal that many of you have reported on went into effect. That has not stopped since October 7th. It didn't stop when three Americans were killed in Jordan earlier in the year. It has never actually stopped. And in fact, we see reports of senior White House officials continuing indirect talks to continue the deal and potentially expand the arrangement. So that's obviously number one. If you want to actually deter and try to crack down, contain, try to de-escalate all of the different segments of what Iran is directing, you need to actually start putting pressure on the director on Tehran. We're not doing that. There are ways we can do that. We can talk about that.

The second piece here is the staging and the theory that if the president can just achieve a ceasefire, a permanent ceasefire in Gaza, an armistice almost wherever the battle line stand, wherever Hamas is, let it be that we just want quiet, and then we will remove the pretext that Iran is using for multiple fronts then we'll be able to broker a ceasefire in Lebanon. Then the Houthis will stop firing into the Red Sea. Understand how that actually plays right into Iran's plans. How is that? Why is that? Okay. Well, obviously we've talked to Nasser about Gaza and what is happening there and what it would mean to leave Hamas intact militarily allow them to freely move around Gaza, rebuild, regroup.

The President says they can't conduct an October 7th today, doesn't mean they won't be able to in a year or two years or three years if you allow the conditions to exist for them to rebuild, forcing Israeli removal of all forces, allowing them to move around, et cetera. But what is going to happen on the Lebanese-Israeli border in this entire theory of U.S. policy? Well, we understand what's on the table. We understand what Amos Hochstein has been negotiating in Lebanon for months, trying to replicate what was negotiated a couple of years ago with the previous Israeli government and the Lebanese over a maritime border dispute to give confidence to investors for natural gas to start flowing. Saying, okay, well, we were able to broker that. We can broker the same compromise on the land border between Israel and Lebanon, giving Hezbollah some sort of win of picking up some territory from the Israelis. They'll suddenly move off the border of Israel permanently up to a certain point, maybe 10 kilometers, maybe all the way to Litani River, and who's going to enforce the military demilitarization of this area?

Well, it'll be the Lebanese Armed forces and UNIFIL, the UN peacekeepers in Southern Lebanon. Why does none of this make sense? In the maritime border dispute, Hezbollah gave up nothing. They didn't have to do anything. All they had to do was agree they weren't going to fire missiles at gas platforms, not a big concession. That was the big win. And to get Hezbollah is simply promise not to attack natural gas because Lebanon would be getting concessions. They were able to move forward with this agreement. You're now talking about forcing Hezbollah to actually dismantle and remove all of its forces and capabilities for many, many kilometers away from Israel's border understand that we understand from estimates in Israel, 80% of the Hezbollah fighters, the terrorists who have been announced that have been killed in Israeli counterstrikes since October 7th, lived in the border communities in Southern Lebanon, which means their families lived there, which means under their homes are where the missiles are because as we know, Hezbollah uses human shields.

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And so the idea that you're just going to magically have a ceasefire where Hezbollah is going to remove itself, walk families, communities 20 kilometers north, is fantastical thinking unless they are forced to do that by a military force and who's going to be enforcing this UNIFIL and the Lebanese Armed forces. Let's remember to go back in time 2006, after the last major Lebanon-Israel war, we had a UN Security Council Resolution 1701 that said it was going to be the responsibility of UNIFIL with the Lebanese Armed forces to prevent the flow of weapons to Hezbollah and Southern Lebanon. John just told you there's 200,000 or more projectiles now all flooded in since 2006 by the Iranians with full tacit approval of the LAF, the Lebanese Armed forces, and UNIFIL. We're sending them hundreds of millions of dollars per year. The budget request is to give another \$150 million both to the LAF

GOLDBERG: ... and to UNIFIL. \$300 million for what? To allow more weapons to keep building up and have a phony removal of Hezbollah forces, which is never going to happen? So you look at that context, what you're going to end up is the status quo or worse, where you've taken a country, a democracy the size of New Jersey, and shrunk it de facto. You have forced Israel to remove its communities from the border. And as Hezbollah sees the US restraining Israel, sees the US trying to push Israel not to respond, they will start pressing forward farther and farther south. And we're seeing that happen this week. The writing is on the wall, the Iranians are smelling that there is massive amounts of American pressure on Israel to surrender to Hamas's demands in Gaza and then be able to get them to surrender to Hezbollah in Northern Israel. So what happens at the end of this? Joe Biden can get his peace and quiet for six months, it will be at Israel's security expense where Hamas rebuilds, Hezbollah has greater advantage than ever, and Iran keeps building up its strength on the back of US sanctions relief.

It's a broken policy and I think if we wanted to start changing it, you do two things. One, start imposing pressure on the Islamic Republic, and number two, start demonstrating support for Israel's need to return communities to its northern border. And at the very least, that would require some enforceable through Israeli military action buffer zone that reaches farther into southern Lebanon to give communities at least the security that they won't suffer a catastrophic October 7th while Israel waits for the future for its own independent munitions production so that President Biden can't pull the string on withholding weapons until they feel they're comfortable having completed the mission in Gaza, having the munitions they need to go for a much wider war in Lebanon to destroy all those major capabilities that John told you about that Iran needs on Israel's border to deter, one other thing, Israeli military action against Iran's nuclear program. I'll stop there.

DOUGHERTY: Thank you, Rich. David, over to you.

DAOUD: Thank you all for attending and I'm going to be building up on what Jonathan and Richard said, but I'm going to take us all back starting to 10/8 when Hezbollah's attacks on Israel started and kind of going back even before that to understand Hezbollah's motivations and what this means for a potential ceasefire and for the future outlook of the conflict between Israel and Hezbollah. So on 10/8, second day after Al-Aqsa Flood was launched out of Gaza, Hezbollah starts attacking Israel. There is no provocation. Now, Hezbollah has tried to frame this defensively. Jonathan raised the issue that the Israelis had initially contemplated a potential action against Hezbollah in the north, but Hezbollah had no way of knowing that. The first report on this, I believe, came out on 10/21, that the Israelis had been contemplating a major action in the North. Hezbollah's action started on 10/8.

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So the motivation there was... Hezbollah doesn't operate independently, neither does Hamas or the other terror factions that are in Gaza. They are all part of this broader network called the Resistance Axis so-called that is headed by Iran. Now there is a consultative nature to this broad regional alliance, but at the end of the day, if Iran gives the order... As Secretary-General Hassan Nasrallah has said, "Wherever we must be, we will be." And whether that is in the interests or not of that individual actor, Iran's ultimate interest override. So with Gaza, we have this almost twenty-year investment by the Resistance Axis into turning Gaza into basically this large military installation, the intertwining of Hamas' infrastructure with the civilian population, these 300 plus miles of tunnels, these domestic weapons production capability, so on and so forth. Iran does not want to lose that investment so easily, not just because of the investment itself, but because of its future plans against the state of Israel as part of this ring of fire they've been building around the Israelis.

Hezbollah as their most powerful actor, their most powerful proxy has a support role. So we see Hezbollah start to enter this war to, as they've said, relieve pressure off of Gaza, relieve pressure off of the terrorist factions in Gaza in order to, in their own words, ensure their survival the day after this war, that if the Israeli attention is drawn in two different directions, they can't move against Gaza as quickly. At the same time, Hezbollah is dealing with its own domestic issues. As you may know, since October 17th, 2019 Lebanon has been dealing with an unprecedented economic crisis, not just in Lebanon's history, but in global history. The currency has lost almost a hundred percent of its value and there are different repercussions to this economic crisis. It may have bottomed out, but it hasn't begun to recover.

So as Hezbollah, what you don't want to do if you're trying to navigate this crisis is to compound an economic crisis with a security conflagration. So you're kind of in this middle road between fulfilling your duties to the Resistance Axis and burning the ground under you by inviting this war of unprecedented destruction upon Lebanon. What you do is, as they've described this, engage in a war of attrition and they have described this as a war of attrition. Now, I think Hezbollah, as their leadership has said, did not expect the war to last this long. They have tied the continuation of this war of attrition to a ceasefire in Gaza, meaning if Israel halts its campaign in Gaza, Hezbollah will simultaneously halt in the north. But Naim Qassem, the Deputy Secretary General said, I think last month they expected this to be another short round which would kind of demonstrate their lack of a proper reading of the Israeli mood and the impact of 10/7 on Israel's desire to destroy Hamas, and they've ratcheted up their pressure gradually.

Their initial entry was kind of a tiptoeing, kind of a putting your toe in the water to see what will the Israeli response be. "Are we going to get back this major blowback...?" To prevent another "Had I known moment." In the wake of the 2006 war, Hassan Nasrallah said, "Had I known that our action would've brought this war upon us, I would not have engaged in this action." So there was this kind of gradual ratcheting up and it timed itself... And you can see kind of the progression. On the one hand, Israeli action in Gaza prompts Hezbollah to act. And on the other hand, you see the intensification of international pressure, particularly US pressure on Israel, gives Hezbollah that depth to act. Their boldness is tied directly to that international pressure. We see this particularly in the past month where the lethality, the frequency, the range, the types of weapons that Hezbollah are using have been unprecedented. Even in the course of this eight month conflict, it's beyond kind of this gradual ratcheting up of phases. It's going into something new.

And it's depending on the fact that they see unprecedented daylight between the United States and Israel. So look at it this way, that Hezbollah's freedom of action works in inverse proportion to Israel's and they understand that Israel's freedom of action is primarily tied to United States' support because of the diplomatic support that is necessary from the United States for Israel to continue fighting because of weapons resupply. So starting in May, we see the halt of weapons shipments from the United States. We see the United States doubling down on this and suddenly and coterminously with this, we see Israeli action in Rafah, and suddenly we see Hezbollah emboldened not just to strike, but the types of weapons they're using are precision weapons. They're guided, they're meant to kill. So we've had, I think, 25 Israelis between civilians and soldiers killed since the onset of the conflict. In May, within the span of a week, about four people were killed and these people weren't killed... These Israelis weren't killed with rocket barrages.

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They were killed primarily with loitering munitions. These are precision weapons. This is something you can guide towards a congregation of soldiers or a gathering of people and draw blood. We also saw this the other day. Another soldier was killed in an attack on Hurfeish, a Druze village in Northern Israel, again with a loitering munition. So we're seeing Hezbollah trying to draw blood. At the same time, they feel that they can hide behind the fact that they believe Israel's hands are increasingly tied. But what they've got, what they've done is, at least on a legal level, is give Israel a justification to act against them militarily and to act very deeply. But they're depending on the fact that Israel simultaneously does not have the international legitimacy to act. The international community is not even satisfied with Israel's campaign in Gaza.

They're not going to sanction a simultaneous one in Lebanon. And the outgrowth of this that we're seeing are these diplomatic efforts. There's the French diplomatic effort and a parallel one by Amos Hochstein, an American diplomatic effort, to achieve a peaceful resolution to the conflict in the north. But the details differ between these two diplomatic efforts, but where they both fail, and this is kind of where they overlap is... Well, there's several areas. The first area is enforceability. Richard raised this in his portion of this talk. They all depend or they both depend on the Lebanese Armed forces and UNIFIL to ensure Hezbollah's compliance with the terms of the ceasefire deal and Lebanese Armed forces simply can't. This isn't a matter of numbers, this is a matter of capability plus will. We need to understand that Hezbollah is not an aberration in Lebanon. It's not something that has been imposed upon Lebanon.

This is a movement that has massive political support in Lebanon. It is, as it calls itself, an integral part of Lebanon's political and social fabric. In the last parliamentary elections in May, 2022, they garnered 356,000 votes. In terms of pure numbers of votes, that was the most of any party by about 150,000. The next in number of votes was the Lebanese Forces Party. The Lebanese Forces Party got more seats, but again, I think the votes are more critical in terms of popular support. There was a recent Washington Institute poll that came out in January of 2024 that showed that Hezbollah has 89 to 93% support among Lebanese Shia. Now this support can be motivated by ideological agreement. It could be motivated by indifference, and you're just getting the social benefits and political benefits from Hezbollah. It could also be motivated by fear.

And I think the difference, the distinction of who supports Hezbollah why is irrelevant ultimately because if you will line up behind the group, then you're lining up behind the group. So Lebanon's decision making on the most minor or major issues is done by consensus of all the sects. Those sects have their representative parties and the major representative of the Shia population, one of them is Hezbollah. So if you're going to try to disarm Hezbollah by consensus or get it to move 10 kilometers, 20 kilometers, however much from the northern border or to not to attack Israel, you have to get its permission. And Hezbollah is not in the business of self-destruction. They're not going to willingly give up their arms. They understand this is part of their longevity. They want to survive, they want to serve this broader cause that Iran has, so they're not going to give up their weapons willingly.

So peaceful disarmament of Hezbollah through consensus, through Lebanese consensus is a non-starter. The alternative is that the LAF uses force against Hezbollah, either to distance them from the border or to disarm them entirely. This is Lebanon's obligations under Resolution 1701. That also is a non-starter because of Hezbollah's support that we just talked about. This would lead to civil war as Lebanon's foreign minister Abdallah Bou Habib has said. He said, "If Hezbollah remains armed, this is something that could lead us to regional war. If we try to disarm Hezbollah, this will lead us to civil war. And we will always prefer regional war over civil war because civil war has no end." So this is the Lebanese motivation. At the same time we've seen the Lebanese government, as Richard noted... He brought us back to the October of 2022 maritime border deal. They feel that they can replicate the benefit they got out of this, out of that border deal, from the current conflict, that Hezbollah's attacks can lead to Lebanon resolving the outstanding border disputes with Israel in its favor.

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And the French and American proposals have components... They differ in some areas on the resolution of this border dispute because Blue Line is not a border. So let's finalize this. The problem is that this misunderstands Hezbollah's motivations. It is not a matter of a mere dispute with Israel. Hezbollah's dispute with Israel is its very existence. You can resolve the border, you can set the boundaries, Israel can withdraw and everyone can adhere on the surface to Resolution 1701 and Hezbollah will continue to attack or at least continue to prepare for a future attack against the Israelis. And this implacability is what none of the peaceful proposals even begin to deal with because it sets you in front of a reality that whatever you do now cannot be resolved by peaceful means.

It's only kicking the bucket down the road and it's setting up for a future conflict that will be far more destructive than the one that will happen now. Now, one thing that the Israelis realized on 10/7... They had quiet on the Gaza border leading up to 10/6. Quiet is not security. If you have an enemy, an implacable foe on the other side that irrespective of quiet, irrespective of whatever temporary deals you reach with them to achieve this quiet is nevertheless preparing for that day of judgment, as it were, that big regional conflict or just a major attack where they can catch you off guard down the road, then there's nothing you can really give them in the interim. And this is the situation we have with Hezbollah. And I think the Israeli public, particularly the 60 to 80,000 Israelis that have been displaced from the north, have come to realize this.

That if they are going to return home without some permanent resolution and one that deals with all the questions that I just raised, then they are going to be returning home to a Damocles sword over their head, that one day Hezbollah's Wan forces, this massive arsenal they have got build up, they will decide to activate it and we will have another 10/7, but on a much more lethal and a larger scale. So the Israeli government has to respond to the needs of its population. And that puts us before a situation where it does not seem, at least in terms of the current proposals, there is a peaceful resolution to the issue in the north. And Hezbollah is continuing to attack. It is continuing to emphasize the threat that it poses to Israel's security.

DOUGHERTY: David, thank you. And Hussain, over to you.

HUSSAIN: Thank you, Joe. I'll try to quickly explain how the Gulf countries, mainly the UAE, the United Arab Emirates and Saudi Arabia look at

HUSSAIN: What's going on in the US policy. And if there's one word to summarize how the Gulf looks at the US, it would be inconsistency, the inconsistency of US foreign policy. And I'll give a quick example here. On the first month of the Biden administration, it removed the Houthis in Yemen off the foreign terrorist organization's list of the State Department. And we also stopped supplying offensive weapons to the Saudis, forcing them to bring the war on the Houthis in Yemen to an end.

We also promised both the UAE and Saudi Arabia that by doing so, the United States diplomacy will deliver Yemen. There'll be a national unity cabinet that will take care of ending the war and of reining in Houthis. None of this happened. And a few years after that, the Houthis started striking ships in the Strait of Mandeb near Yemen threatening international trade, forcing the United States to intervene and go after these ships.

And Washington, of course, did what it knows how to do best, try to build a global coalition. And we knocked on the door of Saudi Arabia and the UAE saying, Hey, listen, these are your enemies. Do you want to join us? And the Saudis and the Emiratis said, thanks but no, thanks, we're not joining. And at the time I remember I reached out to government officials and asked, that's your chance. And the response was that the Biden administration had just deployed officials to meet with Iranians in secret in Oman to sort out the Houthis situation.

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So inconsistency is something that really scares many countries. Now, why does it scare countries like Saudi Arabia and the UAE? These countries are relatively small. The GDP of the UAE is roughly half a trillion. The GDP of Saudi Arabia is 1.2 trillion. If you want to compare to the US, we are at 27 or 28 trillion. So these countries can't afford to make mistakes. They often hedge and they have to have the correct bets, otherwise, they'll be knocked out. So that's why we see them all the time just trying to either stick with the strong horse, which until very recently used to be the United States, or now they try to make nice with China and Russia and whoever comes across.

Until very recently, the UAE and Saudi Arabia perceived of themselves as being part of a coalition that's being led by the United States. They were part of our global war and terror helped against Al-Qaeda and the Taliban. They were standing up to Iran, the sponsor of half a dozen terrorist militias, whether they're in Iraq, Lebanon, Syria, Yemen, and Gaza. But all of a sudden, the US changes. And when the US does that, these countries don't want to be caught on the wrong side of history.

So now we see, last week the president of the UAE, Mohamed bin Zayed received one of the senior or number two Taliban official in UAE. And turns out that he only did that because he was aware that the US ambassador in Afghanistan was in contact with the Taliban. They did the same a few weeks ago, they received the Wafiq Safa, who is the chief of domestic security of Hezbollah inside of Lebanon, the equivalent of the intelligence chief in the country. So what they do is that they're trying to be nice to Iran, the militias, Russia, Ukraine, the United States, Israel, and everybody else. And now what you see is that we have a new policy in the Gulf that they are focused on prosperity and economic growth and they're trying to transform their economies from economies that rely on oil rent to economies that rely on services and knowledge.

And to do that, they need stability and peace. And for stability and peace, they need to be friends with everyone. So whether it's Iran or it's Israel, they're seeking friendship. Shortly before October 7th, Saudi Arabia was advanced in its indirect talks with Israel to normalize relations and follow in the footsteps of both the UAE and Bahrain. And when October 7th happened, the Saudi Arabia stopped even though statements from all its officials, including from its chief politician Crown Prince Mohammed bin Salman said that they were willing to resume talks once the war ends.

The thing with the Gulf countries is that they are still seeking, especially Saudi Arabia, they're still seeking to go to peace with Israel, but they need to have the optics right, so they think they can't freely sign peace and the next day have a bunch of people in Gaza killed or people in Lebanon killed or war still going on. So that's something that they've been trying to avoid and they've been trying to say ceasefire, but really if you look what they've been saying behind closed doors, yesterday or the day before, Axios told us that there was a shouting match between the UAE foreign minister Abdullah bin Zayed and Hussein Sheikh, who's the number two in the Palestinian authority.

So the UAE and Saudi Arabia disagree with what Hamas are doing. They disagree with what Palestinian authorities are doing. They want to be engaged, but the only issue they have is that they do not trust the United States to do it. So they want to go for peace. They want to have a role in post-Hamas Gaza, but they're not sure that the United States will see to it that Israel destroys all of Hamas or that Israel destroys Hezbollah. And as long as they're not sure that this is happening, they're holding off their horses. Even though we know for a fact that behind closed doors, they want all of this to happen.

And I'll leave you with this note. If you are a Lebanese national, it's near impossible to get a visa to go to the United Arab Emirates or probably Saudi Arabia. If you are an Israeli national, your visa to the UAE is guaranteed and you can just automatically get one and go there. This tells you a lot about the choices of these countries, but for now, they're just going to pretend that everything is on hold until things get fixed and until at least maybe either they get an administration they can trust or they see what this administration can do. And that's it for me. Thanks, John.

DOUGHERTY: Thanks, Hussain. I think David was celebrating the visa conversation that you were having right there.



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DAOUD: I'm not sure what happened there.

DOUGHERTY: Okay, so let us open it up now to question-and-answer portion of the call. Just a quick reminder, you may submit your questions via the chat feature or you may use the raise-hand feature and my colleague Mariam will let you know when you are unmuted and you can ask your question.

While we await the first question coming in, I do have one that I did want to ask, and I'll probably open this up to Jonathan and Richard, there's a news report yesterday. The administration has warned Israel not to retaliate in any way, I guess has spell because of potential escalation. Just wanted to know if you could address that. Yeah,

SCHANZER: Yeah. I mean, I addressed it this morning on FDD's morning brief, our three-times-a-week podcast. I personally found it somewhat outrageous that the president would issue such a warning. I mean, first of all, as we've already discussed, the president was the one who warned Israel off of attacking Hezbollah after October 8th. And this could have been handled a lot sooner. It could have been handled months ago. And instead, what's happened is we've watched as the Israelis have had their hands tied primarily by this administration warning them not to engage in the north, and with every passing week, with every passing month, we've been watching escalation on the part of Hezbollah. They understand that Israel's hands are tied and they understand that Israel's hands are tied by the United States. They're taking advantage of this dynamic. I think it's also worth noting that the US is responsible in part for the funding and arming of Hezbollah over the years that the 2015 nuclear deal, which of course, the president was party to, gave Iran billions of dollars and a chunk of that went to Hezbollah. We know this as a fact.

We know that the administration continues to not enforce sanctions to their fullest, which continues to give Iran the funding or the money that is needed in order to continue to provide that funding to Hezbollah. And Hezbollah gets about \$800 million a year from the Iranian regime, and that doesn't even include the weapons and the training, and the indoctrination. So this is a policy of neglect on the part of the administration. And in the past, it was actually a policy of contributing to the problem. This is not the moment to be warning the Israelis that they shouldn't be responding to what is clear by Iran and its proxies. The message actually from the administration should be very stark warnings to Iran and to Hezbollah themselves that if they fail to curb this activity, that the US will not stand in the way of a full-throated Israeli response. That should be the policy of endorsing and helping an ally tackle a problem that they didn't want in the first place.

I mean, the Israelis did not invite the attacks that have been going on. They have been coordinated by the Iranians and by Hezbollah since October 8th. And what the Israelis have gotten from the US consistently is attempts to constrain, attempts to restrain. That is not the policy that can work at this point. We are long past that, and I've made this argument. This war is already started. People may not be calling it a war, but if you've got four to 5,000 different attacks, you've got 100,000 people removed from the border, a back and forth that is daily between Hezbollah and Israel, this is a war already. You cannot unring that bell. And so the question now I think for the administration is how to best support its ally in the region. Restraint, I don't believe at this point is going to do anything. I think probably it will embolden Hezbollah to continue to attack, which has been their policy from the beginning.

DOUGHERTY: Rich, anything you want to add there?

GOLDBERG: No, I think it's interesting. When I've been to Israel since October 7th, I've heard a pretty clear assessment that the very early hours of the president's response to October 7th, especially announcing he was sending the carrier strike group to the Eastern Mediterranean, did play a role in Hezbollah's calculus in those early days and may have prevented a much larger attack by Hezbollah and forced them into a different posture of this slow escalation on a monthly basis to where we are at today.

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But what I also have understood from the assessment is that at some point, whatever fear they had of US support for Israel, US deterrence towards threats to Israel dissipated as they started seeing this being something of a military parade on the high seas rather than an actual attempt to threaten military force or restore deterrence. And so what the absence of US military deterrence has created, alongside what David has said, the additional perception and reality of the US restraining Israel, not just offering its own military support and additional deterrence assets to support Israel, but actually actively withholding military assistance pressuring Israel in various ways.

Something like this Axios report, these statements being made is just one more additional piece of evidence that Hezbollah needs to see Israel as weak for Tehran to see Israel in a defensive crouch and therefore embolden additional escalation. So this will actually work against the president, and I believed that has been true in how he has conducted his rhetoric towards the war against Hamas. It has worked against getting a hostage deal and it is going to work against any deterrence towards Hezbollah.

The last thing I'll say is if you're an American, you're watching all this. I just want to try to put this into an American context. Michigan, Wisconsin and Minnesota have been evacuated. And in the last couple of weeks after just months of just nonstop missile and drone attacks on those three states, Hezbollah, this terrorist organization that's just on our northern border inside Canada has started launching missiles and drones deeper... into Chicago and into Indiana and into Iowa and other mid-middle America areas. And wildfires have started based on where these rockets and drones are striking. And there's just pictures on TV of just literally Northern America just on fire while missiles keep coming in and people are dying and people are evacuated.

What on earth would we do? We would just say, yeah, absolutely, we should just have a ceasefire right now and cede our northern border states to the terrorist organization on a northern border? We should just wait until after the US election or somebody else's election? That doesn't like the fact that we're about to fight back? No, we would absolutely respond with overwhelming force. The idea that we would have a double standard for Israel right now to me is outrageous.

DOUGHERTY: Thank you, Rich. Also, thank you, Jonathan. We do not have any other questions lined up, so I am going to ask each of you to do a 30-second to a-minute summary of your thoughts. But before we get there, I just want to remind our journalists that one, thank you for participating in today's call. Two, you can find all of our research at fdd.org and three to arrange separate one-on-one conversations with each of our experts, please reach us at press@fdd.org and, of course, has happened in the past. Once I say that, we do have a question that has come in.

If war does break out, won't Israel need to take over a large chunk of southern

DOUGHERTY: ... Lebanon. That could go to any of the four of you, so I'll open the floor.

SCHANZER: I'll start just by saying that yes, not in perpetuity, not permanently, but the goal for Israel is to drive Hezbollah north of the Litani River. So you're talking about a several mile buffer zone where there would be no militant activity. There would be no Hamas or Hezbollah activity in this lower, I don't know, quarter to third of the country. That by the way, is already enshrined in a UN resolution that it should be happening already.

And so if Israel is forced to enter Southern Lebanon in order to jettison Hezbollah, they would be doing so actually in accordance with UN Security Council resolution 1701. That will of course not stop those enemies of Israel from waging lawfare probably at the ICC or the ICJ or in other international fora, I'm sure those things will happen, but if Israel is forced to respond or decides at this point that has had enough of these attacks that it's been sustaining, this would, so long as they stopped at the Litani, I would assume that this... International lawyers would have a hard time providing evidence that what Israel was doing was counter to international law. But I'll leave it to others to talk about that. David, I think may have some additional opinions.

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DAOUD: I'll address both questions, but let me start with this. Yes, I think at the minimum what Israel will require for maintaining this, or guaranteeing the security of the North, given what we talked about LAF and UNIFIL can't act as a permanent barrier to Hezbollah's attacks against Israel or even a temporary withdrawal of Hezbollah from the area to a return of Hezbollah forces in the future. You have two elements of waging war. Necessity, meaning all peaceful, reasonable, peaceful means have been exhausted, namely diplomacy. And these diplomatic means have to have a reasonable chance of success. As we said, the offers or the proposals on the table do not seem to have a chance of real success.

The second is proportionality, which is what John was addressing, and I think proportionality, I'm a lawyer by training, laws of armed conflict was my bread and butter and one of the terms that I find most abused is the concept of proportionality because it's portrayed in the popular discourse as almost a tit-for-tat, which is not what international law requires. The victim state, in this case Israel, because Israel did not start the aggression on October 8th, is entitled if necessity is satisfied to take that action which is proportionate to the threat that is posed to ending that threat. So it's not that if Hezbollah fires a rocket, Israel is only entitled to fire a rocket. Israel is entitled to do that which will prevent future rockets from being fired to end the threat of the rockets.

So in this case, at the minimum it would be an incursion up to the Litani, but Hezbollah also has longer range missiles and rockets that can still reach points in Israel, as they say, any point in Israel, that are positioned deeper into Lebanon. So depending on how that war progresses, we could see a deeper and nevertheless legal Israeli incursion into Lebanon to contend with that threat.

And briefly, I will address the Axios report. This isn't the first Axios report of its nature. If we go back to November of 2023, the Biden administration similarly blamed Israel for the escalation in the northern border, and I think Hezbollah took this messaging and has been looking at this messaging to continue escalating its attacks throughout this period. Secretary-General Hassan Nasrallah has repeatedly said that in the past, "Anyone of Hezbollah's attacks that they've launched since October 8th would have led Israel in the past to go to war." And that was a minor exaggeration there, but almost over 2,000 minimum attacks, up to 4,000 attacks certainly Israel has justification to go to war, but they also understand, and I'll quote Nasrallah again that, "America controls Israel." And quoting Nasrallah from March where he said that, "If the American," meaning the United States, "puts their foot down, Israel stops and takes notice." If the United States says, "We're stopping weapons shipments," the IDF chief of staff takes out a notebook and starts to figure out how many artillery shells he has left.

So they realize that the American constraint on Israel and when it's demonstrated in repeated statements and reports like this, allows them to act more forcefully while being virtually guaranteed of a degree of Israeli restraint, meaning these attacks that would've led to war in the past will not lead to war now, so we can take more risks.

SCHANZER: Joe-

DOUGHERTY: Yeah, go ahead.

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SCHANZER: ... I did want to make one last point before we wrap up. One thing to just watch that I think has not gotten enough coverage so far, and we'll figure prominently in any possible war that escalates, that breaks out, we've not yet seen other than perhaps the video that I was talking about this morning, we've not seen the emergence on the battlefield yet of the precision guided munitions that Hezbollah has. Heading into October 7th, we were under the impression that Hezbollah had about 500 of these PGMs. Today, the number that we're hearing from sources in Israel suggests that it's 1,500 now. So it's been increased significantly what that arsenal looks like. These PGMs have the ability, unlike what we see from Hamas, and unlike what we've seen from Hezbollah in wars past, they now have the ability to steer their missiles and rockets towards specific targets. So potentially toward Israel's purported nuclear site in Dimona, toward the chemical plant in Haifa, toward large skyscrapers in Tel Aviv.

These are the things that I think are keeping the Israelis up at night. There are other capabilities that I understand have not yet been made public, but that are also advanced in nature and that have Israeli war planners concerned. These advances in technology, thanks entirely to the efforts of the Islamic Republic is what would make this war more devastating, more destructive than anything that we've seen in the past. Very likely to see very high numbers of casualties on the Israeli side more than probably we've seen in any war period. Up until now, in the Middle East, more destruction of property on both sides of the border. These are, I think, the reasons why the administration is trying at this late date to try to head off this crisis. Of course, they have their ulterior motives as well, such as the elections coming in November. But I do think that there's every reason to be concerned about the destructive nature of the war that looms, and I do think that the technology specifically is one to keep an eye on.

DOUGHERTY: [inaudible]. Hussain, last final thoughts on the Gulf. And then Rich, if you can bring us to a close.

HUSSAIN: Yes, thanks, Joe. Just one quick thought. Almost everyone, including Gulf governments, do not look at these two wars as being similar. So the war between Israel and Hamas might have some context in 75 years of conflict and international resolution, two-state solution, all kinds of stuff. Hezbollah doesn't have this position. There's no point of contention between Lebanon and Israel. The only points of contention are 13 border points disputed, and by points we mean actual points, like within five yards or 10 yards. So nothing between Lebanon and Israel calls for Hezbollah to go to war with Israel, and Nasrallah said that we've gone to war for the sake of Gaza. So this puts the Lebanese outside of any context or legal justification, and the Gulf governments understand this and they will unlikely be as nice or as silent on the war with Lebanon as they have been with the case in Gaza. So just to keep in mind that the only common thing between these two wars is that Israel is a party to the war, but everything else is totally different.

DOUGHERTY: Rich?

GOLDBERG: Yeah, I'm going to answer Ben's question and also to wrap up. There are two different kinds of conflicts that Israel could pursue at this point. One could be a total war commitment where you are trying to push Hezbollah all the way to the Litani River in accordance with the UN Security Council resolution. That would require a very large ground invasion combined with air operations and anything else the Israelis employ, and it would require taking a lot of territory, suffering a lot of casualties along the way for some sustained period of time until you feel you've degraded capabilities, can withdraw but will continue to enforce at will through airstrikes whenever you detect a violation of whatever the end result is. That is something that is untenable right now for Israel that wants to avoid two major wars on two fronts and has a US president pulling them back and threatening munition resupply.

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That means you have to look at something else. What is the something else? Well, obviously you have two different kinds of threats from Hezbollah facing Israel today. You have the long-term threat, the major strategic threat that Iran has built to protect its own nuclear program. That threat will be addressed at some point in the next two years. That threat being addressed is tied completely to when Iran's nuclear threat is addressed as well. Whether it happens later in a year and a half, or it happens in the next few months, those two threats run together because Iran uses Hezbollah's larger strategic threats as its primary deterrent along with its own missile force that we've seen it deploy in recent months to protect itself and insulate its nuclear progress.

However, there is also the matter of the 8,000 thousand people who have been evacuated from the north and they're going to need to send their kids back to school in September, and some of them may not come back to the North ever, but a lot of them do want to return to their homes. They're never going to return to their homes until they believe that there's no way for October 7th to happen on the northern border. They will accept missiles and rockets because they've done that for decades. They will have bomb shelters like the Gaza envelope had as well, but they will not go back and live there if there's a threat of Radwan forces coming across the border.

That more limited threat compared to the longer range missile threat that covers all of Israel can be addressed with something short of the Litani River. What that is a matter of debate. How do you get to that sort of buffer zone? It would take a run-up towards total war with the ability to deescalate quickly when limited objectives are achieved. That will require some amount of ground forces combined with intense air forces and potentially even maritime forces as well.

I believe the Axios story was the signal to stop that more limited run-up to try to get those more limited objectives achieved because the Americans are seeing the Israelis looking for a plan C, a plan D. status quo is unsustainable, a bad ceasefire deal isn't even available, and total war is not preferable. Therefore, they're looking for a different option. The Americans are seeing it, and the President is focused on total quiet, no matter the cost to Israel and American national security for political reasons. That's what's happening right now. And if I was Congress, if I was the American people, I would say the Israelis have to deal with this threat. We would not allow this threat to metastasize the way it has in Israel, and the Israelis are going to have to do what they're going to have to do, and hopefully the President in the end, if Israel finally lashes back in a way to protect their population, does have Israel's back. He says he has ironclad support for Israel, that will be tested in coming weeks.

DOUGHERTY: David, Hussain?

SCHANZER: Guys, unfortunately-

DOUGHERTY: I'm sorry, go ahead.

SCHANZER: ... I need to jump-

DOUGHERTY: Copy.

SCHANZER: ... for my one o'clock, but I leave you in the hands of my excellent colleagues.

DOUGHERTY: And we will end it on that note, thank you Jonathan. Richard, David, Hussain. Appreciate your time today. For those of you participating in a call, thank you. Again, to arrange an interview with any of our experts, please email press@fdd.org. This does conclude today's call.