



The Iron Swords War: The Strategic Balance So Far and What's Next

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EXECUTIVE SUMMARY: Ten months after the surprise attack by Hamas on October 7, it is possible to assess the strategic achievements of the antagonists. In addition to inflicting heavy casualties and many wounded on the Israelis, Hamas succeeded in undermining Israeli society and causing divisions within it on the issue of the hostages. Hamas also succeeded in undermining Israel's international status. Israel's economic situation has been severely damaged and continues to deteriorate. Hamas brought the Palestinian issue back to center stage as a condition for a regional settlement, and recruited the Iranian proxies, mainly Hezbollah and the Houthis, for a war of attrition against Israel. Perhaps its greatest achievement is the evacuation of the populations of Jewish settlements within sovereign Israel for the first time since the establishment of the state. On the other hand, Israel is on the verge of crushing Hamas as an organized military force and removing one front from the "ring of fire" created by Iran around Israel. The Iranian attack on Israel proved the effective cooperation of a regional military coalition under the leadership of US Central Command and proved that Israel has an effective defense system against ballistic missiles. Israel regained its trust in the major ground maneuver and reserve soldiers were reestablished as an effective force in the IDF. Civil society also demonstrated its ability to mobilize. Hamas was unable to mobilize the Israeli Arabs to join it nor to mobilize the West Bank for a significant uprising. At this point, Israel is faced with a difficult dilemma. However, it is possible

that a major strategic shift in events, should one occur, will not be related to regional developments but to developments in the global order, as has happened before in the region's history.

Ten months after Hamas launched its surprise attack on Israel on October 7, 2023, it is possible to evaluate the achievements of the war's two parties. Unlike the State of Israel, which officially declares its war aims, we can only estimate what Hamas's war aims were before the October 7 attack. Contrary to the opinions of several commentators who claimed that the goal of the war was to release Palestinian prisoners, it can be assumed that Hamas's war goals were much broader and more ambitious, and some of them were even achieved.

In addition to the immediate goals of war, wars create wider circles of influence. War is like a stone that is thrown into a lake and creates ripples that reach areas far from the spot where the stone hit the water. The effect of war on events and processes is sometimes uncontrollable, not always predictable, and can last a long time. Sometimes the indirect effects are more significant than the goals defined by the combatants as their war aims. There are many examples: The United States overthrew Saddam Hussein in Iraq, but did not expect its victory to result in Iran's taking advantage of the opportunity to become a regional power. Israel did not define a peace deal for Sinai as one of the goals of the Yom Kippur War, but that is what the war eventually led to. Israel succeeded in realizing its main war objective when it went into Lebanon in 1982, which was to remove the Arafat-led Fatah organization from Lebanon – but it did not take into account that that war would lead to the rise of the Shiite element in Lebanon led by Hezbollah.

In view of all this, the balance of achievements and failures of each side in the current war must be looked at with caution. Another difficulty in evaluation is the matter of quantifying achievements – that is, how to determine the "value" or strategic weight of each achievement compared to the failures or achievements of the other side. Without the ability to give such a value or weight it is difficult to make an overall assessment. Nevertheless, it is advisable to conduct an examination of the balance of achievements. Let's start with Hamas and its allies – Iran and its proxies.

The achievements of Hamas and the resistance axis

Hamas managed to take advantage of the crisis in Israeli society in the months before the war to prepare and carry out a surprise attack that shocked and

traumatized Israeli society to a degree comparable to the Yom Kippur War. Some believe that due to the massacre of civilians and the taking of the abductees, the trauma is even deeper.

As a result of the Hamas attack, the towns around the Gaza Strip were evacuated. Fear of a Hezbollah ground attack in the north led to the decision to evacuate the northern border towns as well, resulting in the total evacuation of about 200,000 people. A small number of residents of the south have been able to return and a slow reconstruction process has begun, but in the north, not only are the residents unable to return to their homes, but Hezbollah has spent the months of the war systematically destroying Israeli homes and property through precise shooting. It is difficult to exaggerate the magnitude of the achievement of the axis of resistance in forcing the evacuation of entire swaths of land and shrinking sovereign Israel, something that has not happened since the declaration of the state.

The fact that the army was caught by complete surprise resulted in many casualties on October 7. The hard fighting to occupy the Gaza Strip and destroy Hamas caused fewer casualties than estimated, but still, the number of casualties Israel has suffered is high. Since October 7, the IDF has lost the equivalent of an entire brigade in casualties and wounded, among them skilled special unit fighters and prominent field commanders.

The Hamas attack succeeded in mobilizing a broad and diverse international anti-Israel and indeed openly antisemitic front. The fight against Israel is being waged by states, NGOs, and international institutions such as the United Nations and the Human Rights Council. Huge demonstrations against Israel and supporting Hamas have been organized in major capitals throughout the free world.

Another campaign being waged against Israel is the legal campaign being conducted in the courts of international law, the ICC and the ICJ at The Hague, where lawsuits against Israel and its leaders are pending. These measures are damaging and have long-term consequences for Israel's position. Another arm of this campaign is the mobilization of students in the United States and Europe for anti-Israel protests the likes of which have not been seen since the protests against the Vietnam War in the 1960s. At the same time, there is a strengthening of BDS organizations and a rising economic boycott of Israel by countries and companies. Various countries have banned military aid or even the transfer of aid as a

stopover, as did Spain, which refused to allow an Indian ship loaded with military equipment destined for Israel to dock in its territory.

As an immediate result of the war and the many expenses that accompany it, Israel's economy is facing difficult challenges. This was reflected by the leading rating agencies' downward revision of Israel's economic strength and growth forecast. The downgrade not only reflects the difficulties caused to Israel's economy by the war but also makes it harder for Israel to raise cheap loans to finance war-created deficits.

The Hamas attack brought the Palestinian issue back to center stage. It is no longer possible to talk about progress toward a regional settlement without addressing the Palestinian issue, which means Israeli concessions. As part of the global support for the Palestinian cause, several countries have announced their recognition of a Palestinian state.

The Hamas attack mobilized several Iranian proxies to attack Israel. These attacks are primarily by Hezbollah on the northern border and by Yemen's Houthis, who attack ships in the Red Sea and have fired missiles and anti-aircraft missiles at Eilat. Iraqi Shia militias also occasionally shoot at Israel. While it chose to conduct a limited campaign, Hezbollah has nevertheless caused a great deal of damage to Israel by exposing its weaknesses and inability to effectively stop Hezbollah fire.

The Houthi attacks on international shipping lanes in the Red Sea and the massive Iranian attack on Israel in response to the assassination of one of its senior officials in Syria drew relatively weak responses from the free world. This is worrying in and of itself and has consequences for the free world's deterrence. This weakness of Israel's allies reflects back on Israel.

The continuous attacks by Iran and its proxies on Israel expose a state of erosion of Israeli deterrence since October 7. Despite the success of the military operation in Gaza, Israel has not restored its regional deterrence.

Ten months after the attack, the internal divisions and struggles in Israeli society are reemerging around issues that create a fault line between supporters of the coalition and the government and the opposition and its various groups. To the previous issues of controversy has been added the issue of the hostages and the cessation of the war against continuation of the war and military pressure. These issues are being argued in an atmosphere of acute crisis of confidence among large

contingents of citizens who do not believe the existing leadership is doing enough to free the hostages.

Ten months after the attack, Hamas, even if greatly weakened and without its grip on parts of the Gaza Strip, remains the only ruler in the Strip. Yahya Sinwar and his deputy Mohammed Deif are still in Gaza, even if only partially functioning. They are still in control, and they are holding dozens of hostages alive.

Israel's main achievements

Despite a high price in casualties (albeit much lower than early estimates), Israel's main achievement in the campaign is the destruction of Hamas's military capabilities. Hamas as a significant military system no longer poses a threat to Israel. Israel took away its rocket capabilities and the ability to carry out a large ground raid across the border. The broader meaning is the termination of a central arm of the Iranian "ring of fire" plan around Israel. In the next confrontation against the "axis of resistance", Israel will have one less front to be worried about and will be able to focus its efforts on the remaining theaters of operations.

Another important Israeli achievement that should not be underestimated is the breaking of the psychological barrier of the IDF commanders and the political echelon against a ground maneuver and the use of ground forces. At least since the Second Lebanon War in 2006, there has been a reluctance to use the maneuver as a decisive tool due to considerations of casualties and international pressure. As a result, Israel lost an important tool in its military arsenal and essentially gave up decisiveness, thus damaging Israeli deterrence. In this context, it is important to mention the role of the reserve forces and their return as a central force in the IDF, without which a major operation cannot be carried out.

The occupation of Gaza and accompanying destruction in the Strip created a severe trauma for Palestinian society that will undoubtedly reverberate in the Palestinian and regional consciousness for many years to come. The Palestinians as well as other parties in the region understand the price they may pay if they repeat a brutal attack and murder hundreds of Israeli civilians.

Israeli society has proven once again that it has healthy foundations and is committed to life. The widespread recruitment into the reserves, the return of many Israelis from abroad expressly to enlist, and the mobilization of civil

organizations for the war effort once again proved the resilience and solidarity of Israeli society, which enable it to face difficult challenges.

The subject of the hostages is sensitive and painful. Many people see the half-empty glass - the dozens of hostages still being held alive in Gaza. But it should also be noted that about half the hostages, most of them women, children and the elderly, were released during the military operation at a relatively low price.

Another significant achievement is the coalition led by the United States and specifically by American Central Command to thwart the massive Iranian missile attack on Israel. Israel trained for several years and prepared with its partners for such a scenario, but until it is faced in reality, it is hard to know whether and how such a coalition would be activated on Israel's side. Stopping the Iranian attack was a major success and proof of the existence of a coalition that knows how to function together on the operational level. In addition, Israel proved that its Arrow system is capable of intercepting dozens of ballistic missiles and that Israel is equipped with a unique global capability in this regard.

American backing, and the standing of the United States on Israel's side, is a critical asset for Israeli national strength. However, the sending of aircraft carriers signaled Israeli weakness. Also, the uneven messages of the Americans over the past months, such as the pressure not to enter Rafah, the halting of arms shipments and other statements, did not add to and even weakened Israeli strength. The United States supports Israel, but with many reservations and limitations.

The Arab countries of the Persian Gulf, Jordan, and even Saudi Arabia also participated in repelling the Iranian attack. This marked the peak of another Israeli achievement: the maintaining of the Abraham Accords and the potential for a settlement with Saudi Arabia, which is still on the table. The importance of this development should not be underestimated.

At the same time, Israel achieved another achievement: curbing the outbreak of additional arenas that Hamas hoped would be dragged into the conflict. Following the October 7 attack, Hamas hoped the West Bank as well as the Arab-Israeli sector would join the riots, as happened during Operation Guardian of the Walls in 2021. In fact, the opposite happened. For the most part, the Arab-Israeli public was shocked by the barbarity of the attack (in which quite a few Arabs were also murdered) and expressed solidarity and a shared fate with the Jewish public.

What's next

Israel is in a continuous and difficult campaign, the end of which is hard to discern. The Israeli success story of projecting regional, military, economic and political power suffered a severe blow on October 7. The “axis of resistance” recognizes this weakness and is looking for another opportunity to strike Israel and weaken it further. In the background is Iranian nuclearization, which adds another dramatic dimension to the regional conflict centered on Iran, Israel, and the Sunni-Shia struggle.

Israel is faced with a dilemma. It has two alternatives. The first is talks to end the war and withdraw from Gaza, as demanded by Hamas. In exchange for this and the release of all Palestinian prisoners, Hamas says it will release the hostages. Taking this option would make it possible to reach a settlement in the north, because Nasrallah has said he will stop Hezbollah from firing if there is a ceasefire in Gaza. Israel would be free to rehabilitate itself internally and improve its international position, and would also be able to prepare for the next campaign after a thorough learning of lessons and re-equipping. Israel would be able to resume the promotion of normalization with Saudi Arabia, which would open the door to a security and economic partnership and a regional alliance that would stop Iran and its proxies. Some believe the main purpose of the Hamas attack was to prevent just such an alliance, which would be a regional game-changer.

On the face of it, this alternative has many advantages. It is a tempting idea and many support it. But it has many risks. The withdrawal of the IDF from the Gaza Strip and the release of thousands of terrorists would in fact be an Israeli surrender and a relinquishment of most of the gains of the war. It would represent a tremendous victory for Hamas and the resistance front. It is not at all certain that Hamas would in fact release all the hostages it holds. An Israeli withdrawal (including from the Philadephi axis) would mean a rapid restoration of Hamas’s military capabilities, with Iranian help. Israel, whose deterrence has been severely damaged, would find it difficult to gather legitimacy and support either domestically or internationally for a ground campaign aimed at destroying Hamas. It would be difficult to convince evacuated Israelis to return to their homes under Hezbollah's umbrella. Israel may find itself losing in every direction.

In the second alternative, Israel continues to "mow the grass" in Gaza while putting pressure on Hamas and trying to reach a hostage deal. At the same time, Israel is

building a governmental alternative to Hamas. Israel would be forced to reach a settlement in the north, and if this does not succeed, it would have no choice but to launch a limited attack to drive Hezbollah away from the border. This alternative is also full of risks and is far from simple. It has no clear end, and Israel could find itself in a regional war while it is immersed in a long-standing guerrilla war in Gaza. Its advantage would be the extinction of Hamas in Gaza and the guarantee of its non-return to power.

Both alternatives indicate that Israel will not return to the reality of October 6. It is facing difficult years of a prolonged existential struggle. To this end, it is imperative for Israel to be led by a leadership that enjoys the broad trust of the public.

One more thing to remember: History is full of unexpected turns and twists. The impact of events far from the Middle East, such as the selection of the next American president, can affect Israel's ability to operate in Gaza and Lebanon and can greatly affect deterrence against Iran. Regarding Iran, a development that leads to regime change there could be a game-changing turn. A change in other areas of crisis in the world, such as around Taiwan and the South China Sea or continued Russian advances on the Ukraine front, could change the picture dramatically. In those cases, we are likely to see a shift in global attention toward those crisis centers and a tightening of ranks among the countries of the free world, and as a result, more significant support for Israel and its policies.

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