

Twin Lights Strategies

TLS Beacon: *Israel & Hamas in Context*



Key Points

- An invasion of Gaza will be brutal, long, and costly in lives and material resources. Civilian casualties will greatly exceed military casualties.
- Hamas will push a “crimes against humanity” narrative hoping to gain international support and degrade support for Israel.
- Hezbollah’s threat from Lebanon will persist. However, Hezbollah has limited offensive capability against a State-opponent like Israel.
- Israel is unlikely to attack into Lebanon (short of limited strikes/raids) and focus upon Gaza.

Regional Dynamics

- Iran is *the* indispensable supporter of Hamas and Hezbollah and is deeply entrenched throughout the region.
 - The recent Houthi missile attack—intercepted by a U.S. warship—illustrates Iranian regional influence.
- The Abraham Accords may not be recoverable depending on Arab perceptions of fighting in Gaza.
- U.A.E and Qatar are playing the middle between Hamas, Iran, & Saudi Arabia.
- Continued Iranian bellicosity will add pressure to Sunni nations to counter in kind. Saudi Arabia has stated nuclear ambitions—with a clear eye towards balancing Iran. This path has a strong possibility to trigger a regional nuclear proliferation crisis with global consequences.

Global Implications

- Russia will attempt to exploit the “media attention gap” created by the Gaza crisis in its war with Ukraine, however, it has limited capacity to affect battlefield change.
- China will look for opportunities to enhance its regional presence and influence without becoming directly involved.
 - Internal Chinese forces (economics, demographics, Communist Party dynamics) will remain the chief concern of the Chinese Communist Party & Xi Jinping.
- China may try to play the role of mediator in the Gaza crisis, following its recent success in brokering deal between Iran & Saudi Arabia.
 - This could extend into Chinese-Saudi Arabia nuclear cooperation due to U.S. alignment with Israel in the Gaza crisis and Saudi Arabia’s role as lead Sunni nation.
- China will look for opportunities to expand its influence into the *Global South* while continuing to argue for an “alternate model” of the existing world order.
- The ability of U.S. Administration’s to address regional and global concerns presented by recent events is questionable, with recent rejections by the Saudis in requests for oil production increases.
- U.S. and western support of Israel will increase already strained defense stockpiles dedicated towards Ukraine.
 - *Washington’s Beltway dynamics* will likely increase in vitriol with a push for Europe to take more responsibility for a “European War.”
 - The U.S. Defense Industrial Base is not postured for rapid production increases. Ramping production to match conflict requirements and restock reserves will take significant investment and time.
- U.S. energy production is poorly positioned to address any oil shocks resulting from the Gaza crisis. This concern is exacerbated by the recent distributions from the Strategic Oil Reserve.
- ***The Iran-China-Russia Axis has a new “Theater of Operations” to exert influence.***
- ***The conflict could expand—conceivably globally—with increased aggression from Iran and/or Hezbollah.***
- ***The Gaza crisis—by itself—is unlikely to provide sufficient distraction of Western attention to accelerate China’s anticipated invasion of Taiwan.***