



Middle East and North Africa

Eastern Mediterranean

⬇️ ⚡️ 🗺️ **Israel-Palestine** Israel killed thousands more in Gaza, as over half a million faced famine, and threatened all-out Rafah attack that could decimate 1.5m there; Israel's Ramadan restrictions could fuel violence in West Bank and beyond.

Israel targeted Gaza's south, as aid restrictions increased risk of mass starvation. Israeli forces continued massive bombardment and operations across strip, bringing Palestinian death toll to over 30,000 as of 29 Feb. Israel expanded attacks on Rafah in south that hosts over half of strip's population, vast majority of which is displaced. Even as Israeli military intelligence warned Hamas will remain intact as guerrilla group, war cabinet repeatedly insisted on large-scale ground offensive in Rafah to take out remaining Hamas battalions and 18 Feb said all-out offensive would commence if hostages were not released by Ramadan on 10 March; operation will likely be bloodbath, worsen already-catastrophic conditions and fuel further displacement, including potentially into Egypt (see Egypt). Israeli forces also battled Palestinian militants in Jabalya and Gaza city (north), Deir el Balah (centre) and Khan Younis (south), as rockets into Israel continued. Risk of mass starvation rose further, as aid inflow fell by half in Feb and UN reported 90% of population facing high level of acute food insecurity and almost 600,000 "one step away from famine"; report by U.S./UK universities 19 Feb estimated tens of thousands could die in next six months due to collapsed services. UN special rapporteur on right to food 27 Feb asserted Israel is intentionally starving Palestinians and declared "situation of genocide".

Ceasefire negotiations continued. After PM Netanyahu 7 Feb rejected Hamas ceasefire proposal as "delusional", Israel and Hamas late Feb continued negotiations via mediators, offering hope ceasefire could avert Rafah offensive and release hostages; Netanyahu vowed any ceasefire would merely delay Rafah invasion.

West Bank braced for heightened turmoil during Ramadan. Israel mulled restrictions on Muslim worshippers' access to Al-Aqsa mosque complex in Jerusalem during Ramadan, which could inflame tensions across West Bank and connect arenas by provoking violent actions by Hizbollah/Palestinian factions in Lebanon. Israeli settler violence could escalate, fuelled in part by extremists' fears that international community may recognise Palestinian state.

Israel-Hizbollah hostilities continued. Deadly cross-border strikes persisted, underscoring lingering risk of wider war (see Lebanon).

↓ ⚡ Lebanon Deadly cross-border clashes between Hizbollah and Israel escalated further in scope, underscoring risk of expanded regional conflict during Ramadan in March.

Border clashes further expanded in scope, killing dozen civilians in Lebanon. Israeli strike 10 Feb killed two civilians and wounded senior Hizbollah commander in Jadra town, north of major city Saida. Missiles originating from Lebanon 14 Feb struck Israeli military base in Safed in northern Israel, killing soldier and wounding eight others. In retaliation, Israel unleashed widespread bombing in southern Lebanon, which killed at least ten civilians and several Hizbollah members. Israel 26 Feb launched strikes near Baalbek, in eastern Lebanon's Bekaa Valley, some 100km from border – marking deepest attack inside Lebanese territory since 7 Oct; in response, Hizbollah claimed it fired 60 rockets at Israeli base in Golan Heights. Hamas 28 Feb said it fired two salvos of rockets from Lebanon into Israel. Israeli attacks since Oct have seriously damaged vital local infrastructure and agricultural assets, on which many households in south depend, and displaced at least 86,000 residents.

Amid conflict escalation risks, diplomatic engagement remained limited. Israeli Defence Minister Yoav Gallant 26 Feb said attacks on Hizbollah would continue regardless of whether there is a ceasefire in Gaza. Hostilities risk propelling Israel and Lebanon's strongest militant group toward open-ended, disastrous war, just as Israel faces significant public pressure to confront group more forcefully. Further heightening conflict risk, start of Ramadan on 10 March could see rising tensions between Palestinians and Israel – including at Jerusalem's Holy Esplanade as Israel mulls restrictions on Muslim worshippers' access to Al-Aqsa – which could provoke further violent actions by Hizbollah or Palestinian armed groups in Lebanon. While various diplomatic missions proposed potential terms for settlement, it appeared unlikely such efforts will bear fruit before ceasefire is reached in Gaza.

Executive vacuum and economic crisis persisted. Presidential vacuum that has prevailed since 1 Nov 2022 continued with little apparent prospect of resolution as parliament did not hold presidential election session, reflecting deadlock between political factions. Meanwhile, economic crisis remained severe. Notably, telecommunications workers and army retirees in Feb held strikes and demonstrations in protest of devalued wages and retirement benefits, respectively.

➡ Syria U.S. launched wave of retaliatory airstrikes against Iran-backed groups following killing of soldiers in Jan, Türkiye continued attacks on Kurdish targets, and clashes persisted between regime and rebels in north west.

In east, U.S. targeted Iran-backed groups, which continued attacks. In response to 28 Jan drone attack killing three U.S. soldiers in Jordan, U.S. 2 Feb launched most substantial retaliatory operation in Iraq and Syria since escalatory cycle began in Oct with strikes on more than 85 military targets, killing 29 Iran-backed militants in Syria; in show of restraint, U.S. allowed Iran's Islamic Revolutionary Guard Corps (IRGC) officers to evacuate beforehand. Islamic Resistance in Iraq drone 5 Feb killed six U.S.-allied Syrian Democratic Forces (SDF) at al-Omar base housing U.S. troops in Deir ez-Zor. Compounding risks of escalation, tribal militias backed by regime and IRGC 6 Feb targeted SDF. U.S.-led coalition 10 Feb intercepted six drone attacks targeting Conoco base, Deir ez-Zor. Meanwhile, Israel 2 Feb reportedly killed three Iran-backed militants in capital Damascus; 7 Feb struck Homs city, reportedly killing

ten, including civilians; 21 Feb killed at least two in Damascus; IRGC reportedly scaled back deployment of senior officials and repositioned forces to western countryside.

In north east, Türkiye conducted repeated attacks on SDF. Notably, in Qamishli city, Hasaka province, Türkiye 11 Feb killed two SDF fighters and next day killed Kurdish administration official. With Türkiye seemingly taking advantage of U.S. preoccupation in east to destabilise Kurdish administration, SDF 12 Feb called on U.S. to strengthen its presence in region. Islamic State (ISIS) landmine 25 Feb killed fifteen civilians in Al-Raqqa's eastern countryside.

In north west, regime forces and Hayat Tahrir al-Sham (HTS) clashed. Regime forces, backed by Iranian proxies, targeted HTS with suicide drones in Idlib province: notably, 12 Feb killed two near Jisr al-Shughur city and 18 Feb killed and injured eight HTS fighters near Saraqib city.

Islamic State (ISIS) continued attacks; security forces killed protestor in south. ISIS 13 Feb reportedly killed nine soldiers near al-Sukhna town, Homs province. Security forces 28 Feb killed demonstrator at anti-govt protest in Suwayda city in first fatality since protests erupted in Aug.

Gulf and Arabian Peninsula

► **Iran Iran-backed “Axis of Resistance” groups and U.S./Israel continued confrontations across region, while UN’s nuclear watchdog expressed concern over gov’t’s nuclear advancement.**

U.S. launched retaliatory strikes on Iran-linked groups. In response to 28 Jan drone attack killing three U.S. soldiers in Jordan, attributed to Iran-backed Islamic Resistance in Iraq, U.S. 2 Feb launched most substantial retaliatory operation in Iraq and Syria since escalatory cycle began in Oct with strikes on more than 85 military targets, killing estimated 40 (see Iraq and Syria); Tehran labelled strikes “strategic mistake”. U.S. 7 Feb killed Kata’ib Hizbollah commander known as Abu Baqr al-Saeedi in Iraq, allegedly “responsible for directly planning and participating in attacks on U.S. forces”. Following strikes, frequency of attacks against U.S. forces particularly in Iraq appeared to decline, reportedly with Iran’s encouragement, but it remains to be seen if relative lull will be sustained. Elsewhere, U.S. and UK continued strikes against Houthis (see Yemen); media reports 15 Feb indicated U.S. had carried out cyberattack against Iranian vessel suspected of intelligence gathering in Red Sea. Iranian media 2 Feb confirmed death of Islamic Revolutionary Guard Corps (IRGC) member in Syrian capital Damascus, marking another fatality in series of recent unconfirmed Israeli strikes (see Syria). In attack potentially portending greater Israeli covert operations on Iranian soil, reports attributed 14 Feb blasts damaging gas pipelines to Israel.

Concerns persisted over Iran’s nuclear program. International Atomic Energy Agency’s (IAEA) Director General, Rafael Grossi, 1 Feb noted “a bit of slowing down” of growing stockpile of uranium enriched to 60%. Grossi 13 Feb reiterated concerns over Iran’s lack of transparency, given curtailed IAEA monitoring, and noted “loose talk” among Iranian officials on nuclear weapons capability. Serious diplomatic

engagement between Tehran and Western powers remained absent ahead of IAEA Board of Governors meeting in March.

Washington's sanctions continued to mount. Notably, U.S. 2 Feb blacklisted “network of prolific suppliers of materials and sensitive technology for Iran’s ballistic missile and [drone] programs”, as well as half dozen IRGC officials engaged in “malicious cyber activities”. U.S. 14 Feb sanctioned seven persons and entities, including Central Bank of Iran subsidiary.

➔ **Iraq U.S. launched wave of retaliatory airstrikes against Iran-backed groups following killing of soldiers in Jan, as calls grew for foreign troops’ expulsion; hostilities between Türkiye and Kurdistan Workers’ Party (PKK) continued.**

U.S. retaliated against Iran-backed groups, which appeared to cease attacks in Iraq. In response to 28 Jan drone attack killing three U.S. soldiers in Jordan, attributed to Iran-backed Islamic Resistance in Iraq, U.S. 2 Feb launched most substantial retaliatory operation in Iraq and Syria since escalatory cycle began in Oct with strikes on more than 85 military targets; in Iraq, targets included bases and weapons facilities of Iran’s Islamic Revolutionary Guard Corps (IRGC), Hashd al-Shaabi, and resistance factions. Notably, strikes killed sixteen Hashd fighters and one civilian and injured at least two dozen in al-Qaim and Akasht, Anbar province. Govt accused U.S. of breaching Iraqi sovereignty. In further escalation, U.S. drone strike 7 Feb killed Kata’ib Hizbollah commander Abu Baqr al-Saeedi and two others in Baghdad. Following Iran’s Quds Forces commander’s visit to Baghdad late Jan where he reportedly instructed armed groups to lie low, no attacks from Iran-backed groups were recorded, despite Kata’ib Hizbollah rescinding its late Jan suspension of attacks; for now, it appears that escalation has reached ceiling, although attacks conducted by Iraqi groups in Syria may continue.

U.S. attacks fuelled calls for withdrawal of foreign troops. Following U.S. assassination of al-Saeedi, resistance and Hashd al-Shaabi leaders demanded govt deliver timeline for ending U.S.-led coalition’s mandate. Over 100 parliamentarians 8 Feb signed motion to pass law expelling foreign troops; however, parliament 10 Feb failed to convene for vote on expelling U.S. troops, as Kurdish, Sunni, and almost half of Shia legislators boycotted session, indicating widespread reluctance for rushed withdrawal. Iraq and U.S 11 Feb resumed talks on drawdown of forces.

Türkiye-PKK conflict continued in north. Turkish defence ministry 4 Feb announced killing or capturing five PKK fighters. Turkish defence ministry 17 Feb announced PKK attack on base in northern Iraq killed Turkish soldier. Security officials said alleged Turkish strike 20 Feb killed two in Akre region, Dohuk governorate.

➔ **Saudi Arabia Riyadh reiterated that recognition of Palestinian state must come before normalisation with Israel, as regional diplomacy aimed at ceasefire in Gaza continued.**

Riyadh continued diplomatic pressure for Palestinian state and Gaza ceasefire. Foreign Ministry 7 Feb said it will not resume diplomatic relations with Israel unless Palestinian state is recognised along 1967 borders. Riyadh 8 Feb hosted summit with FMs of Egypt, Jordan, United Arab Emirates, Qatar and Palestinian representative to discuss using reconstruction funding for Gaza as leverage for ceasefire. Saudi

Arabia 16 Feb attended Munich Security Conference to discuss so-called “day-after” plans. Despite U.S. insistence that Houthi attacks on shipping in Red Sea are independent from Gaza, Saudi FM 13 Feb said attacks were linked and reiterated call for ceasefire (see Yemen).

➡ ⚡ **Yemen Undeterred by U.S.-UK bombing campaign, Houthis continued attacks on international shipping as hostilities could escalate further in coming weeks; military build-up along frontlines threatened return to war between Houthis and govt forces.**

Houthis could step up maritime attacks despite U.S.-UK airstrikes. Houthis launched near-daily attacks on shipping in Red Sea, expanding into Gulf of Aden, signalling ineffectiveness of U.S.-UK bombing campaign. Notably, U.S. and UK 3 Feb struck at least 36 Houthi targets in thirteen locations and 11 Feb struck Houthi weapons systems in Salif port, north of Hodeida city; 13 Feb expanded airstrikes to Hajjah province. Houthis 18 Feb attacked Belize-flagged and UK-registered vessel in Gulf of Aden loaded with 41,000 tons of fertilizer, which is critically endangered and poses substantial threat of environmental catastrophe if ship sinks. EU 19 Feb officially launched Red Sea maritime mission to ensure “freedom of navigation”, which Houthis may target when mission becomes operational; Houthi leader 29 Feb threatened military “surprises” in upcoming Red Sea operations.

Military build-up raised spectre of escalation in Marib, Shabwa, Taiz. Houthis reinforced forces along several frontlines, while govt forces showcased preparedness to confront Houthis, seeking assistance from U.S. and others impacted by Houthi maritime actions. Notably, Houthi artillery 15 Feb targeted Al-Miriyah area in Al-Dhale province. Bomb targeting separatist Southern Transitional Council leader next day killed two in Aden. Houthis 17 Feb killed three govt soldiers in Saada province; 19 Feb attacked military site in Taiz province. Risk of wider ground fighting loomed as Houthis may initiate new major offensive, particularly if external actors provide support to anti-Houthi groups.

UN continued efforts to avoid peace process derailing. UN Envoy Hans Grundberg met local and regional leaders during Feb in effort to keep peace process alive, including Iranian, Saudi Arabian and Emirati officials as well as Presidential Leadership Council VP Aiderous al-Zubaidi and Chairman al-Alimi and leader of National Resistance Forces Tareq Saleh in Mocha city.

In another important development. U.S. designation of Houthis as Global Terrorist organisation 16 Feb came into effect amid increasing food prices and suspension of operations by World Food Program in Houthi-controlled areas, and rising inflation in govt-controlled areas.

North Africa

➡ **Algeria Algiers conducted military exercise near Malian border amid diplomatic strains with Bamako and announced free-trade zones in bid to maintain influence in Sahel region.**

Algeria conducted military exercise near Malian border. Malian religious leader Mahmoud Dicko, whom Bamako accuses of backing Tuareg rebels, around 25 Feb

reportedly visited Algeria for second time since Dec. Mali's PM Choguel Kokalla Maïga next day reiterated condemnation of alleged Algerian interference in Malian affairs. Algerian army Chief of Staff Said Chengriha 27 Feb oversaw live-ammunition military exercise in Bordj Badji Mokhtar area near Malian border; defence ministry described exercise as preparation to "destroy a non-conventional enemy".

Algeria announced creation of free-trade zones with Sahel countries. President Tebboune 13 Feb announced plan to open free trade zones with neighbouring countries, starting with Mauritania and expanding to Sahel countries like Mali and Niger, followed by Tunisia and Libya. Move, which comes after Morocco in late 2023 launched initiative aimed at providing Atlantic access to three landlocked Sahelian countries, is part of Algeria's efforts to maintain influence in Sahel despite diplomatic tensions with Bamako, in context that favours intervention of more dynamic and aggressive players, including Russia.

Country started gearing up for election year. Ahead of presidential election due to be held by year's end, political parties close to ruling elites displayed semblance of opposition to Tebboune's still unconfirmed candidacy in bid to provide veneer of legitimacy to predictable ballot. Abdelkader Bengrina, president of Islamist movement El-Bina, 12 Feb advocated for transfer of power to new generation. President of centre-left party Rally for Culture and Democracy, Atmane Mazouz, 17 Feb urged authorities to release all prisoners of conscience and establish "democratic minimum" to avoid "sham election".

➔ **Egypt Cairo continued to grapple with repercussions of Israel's war on Gaza, reportedly preparing for refugee influx in case of ground offensive on Rafah; Cairo and UAE signed major investment deal, alleviating Egypt's foreign currency shortage.**

Egypt reportedly built security zone in Sinai anticipating refugee influx from Gaza. Responding to speculation that Egypt was ready to suspend peace treaty with Israel if latter launches ground offensive on Gaza's southern city of Rafah, FM Sameh Shoukry 12 Feb said Cairo remained committed to agreement as long as Israel was, too. NGO Sinai for Human Rights 14 Feb said Egypt was building fortified buffer zone along border with Gaza to accommodate refugees in case of mass exodus from Gaza, while isolating them from rest of Sinai Peninsula. North Sinai governorate 17 Feb refuted report, claiming ongoing construction works were meant to create logistics zone to manage humanitarian aid. Meanwhile, efforts to broker truce in Gaza picked up pace. After Egypt, Israel, Qatar, and U.S. representatives met in French capital Paris, White House national security adviser Jake Sullivan 25 Feb said parties "came to an understanding" on basic contours of hostage deal and ceasefire; senior Hamas official 27 Feb however said "big gaps" remained on major issues, notably length of truce.

UAE signed agreement for largest foreign direct investment in Egypt's history. Egypt 23 Feb announced mega-deal with United Arab Emirates sovereign wealth fund for development of real estate on Mediterranean coast; deal will bring in \$35bn, virtually solving Egypt's liquidity problems. International Monetary Fund Director Kristalina Georgieva 2 Feb said talks over new loan were in final stretch. Exchange rate devaluation likely to take place before IMF disburses first tranche of new loan.

Turkish president's visit marked culmination of rapprochement between Cairo and Ankara. Turkish President Erdoğan 14 Feb met with President Sisi during first official visit to Egypt since 2012, marking further step in diplomatic reconciliation between two countries and offering opportunities for understandings on issues including East Mediterranean and Libya. Sisi expected to visit Türkiye in April.

➔ **Libya** **New initiatives to facilitate transfer of money from Tripoli to east reduced financial incentives to agree on political solution; Tripoli-based govt struck deal with militias for regular forces to police city.**

Rival authorities continued to strike arrangements to maintain status quo. Eastern-based parliament, House of Representatives (HoR), 5 Feb established Libyan Development and Reconstruction Fund tasked with leading reconstruction efforts across country, and funded directly by Central Bank in capital Tripoli; HoR 19 Feb appointed at its helm east-based military strongman Khalifa Haftar's son, Belqasem. HoR early Feb also established new financial committee that will sign off on countrywide budgetary disbursements; Tripoli's position on move unclear. Meanwhile in address to UN Security Council, UN envoy Abdoulaye Bathily 15 Feb warned Libya could slide into "disintegration" if unable to form unified govt and move toward elections. UN Security Council 27 Feb reiterated call for elections "as soon as possible".

Eastern forces reportedly prepared for show of force and received Russian tanks. Libyan news outlets 12 Feb reported 40 Russian T72 tanks were unloaded in eastern port of Tobruk, allegedly to support Haftar-led Libyan National Army (LNA). Pro-LNA official in following days confirmed reports, adding they expected to receive more fighter jets from Russia. Ahead of thirteenth anniversary of toppling of former leader Muammar Qadhafi on 17 Feb, Haftar-led forces reportedly dispatched military vehicles to Qadhafi's hometown of Sirte (north) to conduct military exercises there, allegedly with Russia's support.

Militias agreed to leave Tripoli after series of clashes in recent months. Tripoli-based Interior Minister Imad Trabelsi 21 Feb said at least five militias that have been controlling Tripoli for past ten years agreed to return to their barracks by 9 April; Trabelsi said regular forces will police Tripoli again. Earlier in month, inter-militia clashes continued in western Libya. Notably, apparent revenge attack against militiaman 17 Feb left ten people dead in Tripoli's Abu Salim neighbourhood.

In another important development. Petroleum Facilities Guard militiamen 25 Feb shut down oil facilities across country in dispute over pay, next day suspended strike after Tripoli-based PM Dabaiba agreed to raise their salaries.

➔ **Tunisia** **Judicial authorities sentenced several govt critics to prison, including Islamist leader Rached Ghannouchi; President Saïed sent mixed signals on economic policy.**

Judicial repression of opposition intensified. Tunis Court 1 Feb sentenced Rached Ghannouchi, imprisoned president of Islamist-inspired An-Nahda movement, and Rafik Abdessalam, his son-in-law and former FM, to three years' imprisonment on charges of illegal foreign financing of their party. Five imprisoned senior politicians, including members of opposition coalition National Salvation Front, 11 Feb went on hunger strike to protest arbitrary detention; Ghannouchi 19 Feb announced joining

strike in solidarity. Tunis courts 23 Jan sentenced former President Marzouki to eight years in prison in absentia for allegedly attempting to overthrow govt; next day sentenced prominent opposition figure Jawher Ben Mbarek to six months in prison on charges of conspiring against state security. Authorities 29 Feb arrested Tunisian General Labour Union's deputy secretary-general, Tahar Mezzi, on undisclosed charges, before releasing him next day.

Election cycle proceeded despite widespread voter disaffection. Second round of local council elections, which will determine composition of second chamber of parliament, 4 Feb took place in 800 of 2,155 electoral districts. Amid boycott from opposition parties, voter turnout reached just 12.44%, almost as low as in first round. Independent High Authority for Elections 12 Feb said presidential election would be held in 2024 in accordance with Constitution.

Saïed sent mixed signals on economic policy. Parliament 6 Feb adopted amendment allowing "exceptional" direct financing of budget by Central Bank, sparking concerns over latter's independence, as well as fiscal stability and debt burden. Authorities in following days used foreign currency reserves to pay for \$850mn Eurobond, leading to 20% fall in foreign currency reserves by mid-Feb. Meanwhile, Saïed 15 Feb appointed Fethi Nouri as new Central Bank governor to replace Marouane Abassi, whose mandate expired; Nouri has demonstrated commitment to orthodox economic policies as member of Central Bank's board of directors since 2016.

➔ **Western Sahara** UN Envoy continued consultations to revive peace process as international pressure on Morocco and Polisario Front independent movement continued to fade.

De Mistura's South Africa visit drew Morocco's ire. UN Envoy Staffan de Mistura 1 Feb visited South Africa, one of Polisario Front independence movement's main sponsors, in likely attempt to explore what leverage he has over Polisario and put pressure on Rabat by broadening his consultations. Moroccan ambassador to UN, Omar Hilale, 3 Feb condemned trip, said de Mistura ignored Rabat's "categorical opposition" to visit and "rejection of any interaction with Pretoria on the subject of the Moroccan Sahara question".

Growing gap between Polisario leadership and more radical activists came to fore. In interview to Spanish left-wing outlet, Nueva Revolución, Mansur Omar, Polisario Front representative to European Union, 10 Feb said Polisario was trying to contain intensity of conflict with Morocco to avoid stoking regional tensions and broaden conflict. Statement, which contradicted conclusions of Jan 2023 Polisario congress calling for military escalation with Morocco, triggered vocal opposition from some Polisario activists, who accused Omar and Polisario leadership of letting down fight for independence of Western Sahara.