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LEBANON: Israeli Operations Likely Strengthening Hezbollah's Domestic Legitimacy

Summary: Israeli strikes and potential expansion of operations in southern Lebanon are likely strengthening Hezbollah's domestic legitimacy despite Beirut's efforts to weaken the group.

Development: On 2 March, Israeli forces began a renewed campaign of airstrikes and ground operations in southern Lebanon, killing at least 1,072 people, injuring at least 2,966, and displacing more than 1.5 million, according to *Al Jazeera*. Jerusalem expanded ground operations south of the Litani River and has maintained evacuation orders in the area, with Defense Minister Israel Katz stating these will remain until northern Israel's security is "guaranteed," according to NBC. Israeli forces also targeted infrastructure, including bridges connecting northern and southern Lebanon. Some Israeli officials, including Finance Minister Bezalel Smotrich on 23 March, have called for annexation of territory south of the Litani River, according to Reuters and NBC. The conflict follows Hezbollah strikes against Israel in support of Iran. On 24 March, Beirut expelled the Iranian ambassador due to Tehran's backing of Hezbollah, according to the *New York Times*. In November 2024, Israel agreed to withdraw from Lebanese territory while Beirut committed to disarming Hezbollah, but neither condition materialized, according to the *Times of Israel*.

Analysis: Israeli military operations in Lebanon are likely strengthening Hezbollah's position by increasing its perceived legitimacy as a defender against external aggression. Continued Israeli strikes and a potential expansion or prolonged presence in southern Lebanon will almost certainly increase domestic backlash, which Hezbollah will likely exploit to reinforce its narrative as a resistance force. This dynamic will likely undermine Beirut's efforts to delegitimize and disarm the group, as public support shifts toward actors perceived as capable of confronting Israeli operations. Additionally, Israeli targeting of infrastructure and displacement of civilians will likely exacerbate humanitarian conditions, further enabling Hezbollah to capitalize on grievances. Despite Jerusalem's efforts to degrade Hezbollah's capabilities, these operations will likely produce limited strategic effect while reinforcing the group's political and social standing within Lebanon.

[Christina Muchow]

CHINA: Iran War Positioning Likely Increasing Energy Realignment Around Taiwan

Summary: China's diplomatic response to the Iran war will likely accelerate regional energy realignment toward the United States and increase strategic pressure around Taiwan as Beijing seeks to protect energy security and counter shifting regional dynamics.

Development: On 23 March, Chinese officials warned that continued escalation in the 2026 Iran War could trigger a "vicious cycle" of conflict and economic instability, according to Reuters. Chinese officials called on the United States and Israel to reduce military activity and pursue de-escalation. The Iran war has delayed high-level diplomatic engagement between Beijing and Washington, including a planned leadership meeting. Taiwan and other Asian economies have increased imports of liquefied natural gas from the United States in response to disruptions in Middle Eastern energy supplies, according to *The Washington Post*. Reporting indicates that current oil market disruptions have reached levels comparable to previous global energy crises, according to *The Guardian*.

Analysis: Beijing's diplomatic messaging likely reflects concerns over energy security and economic stability rather than neutrality in the Iran war. Beijing depends on stable Middle Eastern energy flows, and disruptions to those flows threaten industrial output and military readiness. Beijing will likely continue to call for de-escalation while avoiding direct involvement to reduce risk to its supply chains. Regional energy diversification will likely reduce Beijing's indirect leverage over neighboring states. Increased reliance on American liquefied natural gas will likely strengthen economic and strategic ties between the Washington and regional actors, including Taipei. Beijing will likely respond to this realignment by increasing military activity near Taiwan and surrounding maritime areas. Control over the Taiwan Strait would almost certainly enhance Beijing's ability to influence regional shipping routes and counter external involvement. Increased patrols and exercises would likely allow Beijing to signal resolve and protect perceived strategic interests without directly escalating the conflict. Overall, Beijing will likely pursue a dual-track approach that combines diplomatic de-escalation efforts with increased regional military signaling to mitigate energy risks and counter shifting geopolitical dynamics.

[Armaan Needles]

MEXICO: Cartel Likely to Avoid Major Infighting Despite Leadership Change

Summary: Jalisco New Generation Cartel (CJNG) will likely avoid the historical tendency for cartel groups to devolve into violent infighting after its leadership is decapitated because it has unified around a single new leader.

Development: On 22 February, Mexican authorities killed CJNG leader Nemesio Oseguera Cervantes while arresting him. Cervantes' death sparked violence across Mexico, primarily in Jalisco and Michoacan, as CJNG retaliated against Mexico City. Mexico City has used this "kingpin strategy," systematically targeting cartel leadership for arrest, since 2006. On average, each arrested or killed kingpin leads to one additional criminal group beginning operations in that territory as the group fragments, according to the Lieber Institute's Articles of War. On 18 March, *The Wall Street Journal* reported that Juan Carlos Valencia Gonzalez, Cervantes' stepson, has become the new leader of CJNG. Other high-ranking CJNG members agreed to support Gonzalez to maintain business continuity and avoid infighting, according to *Border Report*. CJNG utilizes a franchise model with highly autonomous regional leaders and several aligned smaller groups, such as Los Chapitos, according to Articles of War and the Latin Times.

Analysis: If *The Wall Street Journal's* reporting is accurate, CJNG will likely avoid the most serious infighting that generally follows kingpin removals. However, violence associated with CJNG will likely still occur at a heightened level compared to pre-removal violence, as allied groups outside the CJNG's central leadership seek greater personal power and autonomy. This risk is likely higher with non-member aligned groups such as Los Chapitos compared to regional factions outside of Jalisco and Michoacan. If Gonzalez cannot respond effectively to these threats to his control, it would likely spark renewed leadership struggles and infighting. The reporting cannot be corroborated at this time, reducing analytic confidence.

[Christina Muchow]]

About GSIS

Embry-Riddle Aeronautical University's (ERAU) Bachelor of Science in Global Security & Intelligence Studies (GSIS) degree program at our Prescott Campus blends both academic and professional studies to equip students with the knowledge and skills necessary to become future leaders in intelligence, security, and law enforcement. The program provides students with a sound foundation in the liberal arts, including international relations, foreign languages and cultures, international law, foreign policy, political and military history, and other essential topics.

About EE

Eagle Eye Intelligence (EE) is an intelligence and research organization led by the students of the GSIS program at ERAU in Prescott, Arizona.

Dr. Philip E. Jones founded EE and Embry-Riddle's GSIS program in 2002, following a career with the Central Intelligence Agency and consulting work in international development and global security. Currently, Professor Dale R. Avery, a former career intelligence analyst, serves as EE's faculty advisor.

EE strives to provide actionable intelligence and analysis to its customers during the academic year. We are driven by a number of goals – continuous development, nonpartisanship, interdisciplinary studies, global awareness, and professionalism.

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Christina Muchow, a Senior in the GSIS program, currently serves as EE's Editor in Chief. For questions or comments, contact the team at editorsee@gmail.com or Professor Avery at 928.777.4708. If you use material from this publication, you should attribute: Eagle Eye Intelligence Edition 494, a publication created by students at Embry-Riddle Aeronautical University in Prescott, Arizona.



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