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Centre for Pakistan and Gulf Studies

CPGS

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Assessment of Israel's Economy: Post 7th October Wars Analysis

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Foresight: Issue Brief *is a monthly publication by CPGS (Center for Pakistan and Gulf Studies) that provides in-depth analysis and strategic insights into critical global issues. Each release focuses on a single, pressing topic, whether it be economic, military, or political in nature, offering readers a comprehensive understanding of the subject matter. The briefs are designed to be concise yet thorough, combining expert analysis, data-driven research, and forward-looking perspectives to inform decision-makers, policymakers, and stakeholders. By addressing one key issue per edition, CPGS' Foresight: Issue Brief ensures a focused and actionable exploration of challenges and opportunities shaping the global landscape. This publication serves as a vital resource for those seeking to stay ahead of emerging trends and make informed, strategic decisions in an increasingly complex world.*

Prepared by

Team (CPGS)

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INNOVATING FUTURE

Message from CPGS President, Nasir Abbas Shirazi:

President's Message: Foresight: Issue Brief

At the Center for Policy and Global Strategy (CPGS), our mission has always been to provide clarity in an increasingly complex world. With the launch of *Foresight: Issue Brief*, we take a significant step forward in fulfilling that mission. This monthly publication is designed to cut through the noise and deliver focused, insightful, and actionable analysis on the most pressing issues of our time—be they economic, military, or political.

In a world defined by rapid change and interconnected challenges, decision-makers need reliable, forward-thinking resources to navigate uncertainty. *Foresight* is precisely that resource. Each issue is dedicated to a single topic, allowing us to delve deeply into the nuances of the subject and provide strategic perspectives that are both timely and timeless. Our team of experts brings together rigorous research, data-driven insights, and a global outlook to ensure that *Foresight* is not just informative but also transformative.

As President of CPGS, I am proud to present this publication as a testament to our commitment to excellence and innovation in policy analysis. *Foresight* is more than just a briefing—it is a tool for shaping the future. Whether you are a policymaker, business leader, or engaged global citizen, I am confident that *Foresight* will empower you to make informed decisions and anticipate the challenges and opportunities ahead.

Thank you for joining us on this journey. Together, let's turn foresight into action.

Mr. Nasir Abbas Shirazi
President Centre for Pakistan and Gulf Studies

Assessment of Israel's Economic Condition: Post 7th October Wars Analysis

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[1]An Israeli historian has stated that Zionism is entering its final phase, predicting that its ideology will ultimately fall and collapse. He attributes the anticipated downfall of Israel to several key factors, including global isolation driven by international courts holding it accountable for the genocide in Gaza and the increasing fractures within Israeli society. The historian emphasized that the Neo-Zionist government has played a significant role in this decline, exacerbating divisions within the country and straining its relationships with allies. These deteriorating relationships, he argued, will further contribute to Israel's collapse on the global stage. Additionally, the historian predicted that former U.S. President Donald Trump would trigger a decline in the U.S. economy, leading to reduced American involvement in the Middle East over time. This withdrawal, he suggests, will also play a part in Israel's weakening position.

[1] https://youtu.be/PLzCrKfblqY?si=374e_PIwPYeF6wDq

Israel's Post-War Economic Fallout: A Comprehensive Overview

[2]*The Israeli economic newspaper* Calcalist *estimated that the total cost of the war on the Gaza Strip could reach approximately 250 billion shekels ($67.57 billion) by the end of 2024.*

Israel has reported financial losses amounting to $67 billion due to its ongoing war on Gaza. These include $34 billion in direct military expenses and $40 billion in budgetary losses, marking the highest financial toll in its history. Approximately 60,000 businesses shut down over the past year, a 50 percent increase compared to 2023. The tourism sector suffered a 70 percent decline in visitors, leading to losses exceeding $5 billion, while the construction industry incurred losses of $4 billion and saw over 70 companies closing operations. A third of Israel's population now lives below the poverty line, and a quarter faces food insecurity. These figures were disclosed shortly before a ceasefire agreement with Gaza was reached. The Israeli Ministry of Finance revealed that financial losses tied to the war in Gaza since October 7, 2023, totaled approximately 125 billion shekels ($34.09 billion). The ministry also reported a budget deficit of 19.2 billion shekels ($5.2 billion) in December due to increased wartime expenditures in Gaza and Lebanon. These figures represent only the direct costs of the war, excluding the broader

[2] https://www.calcalistech.com/ctechnews

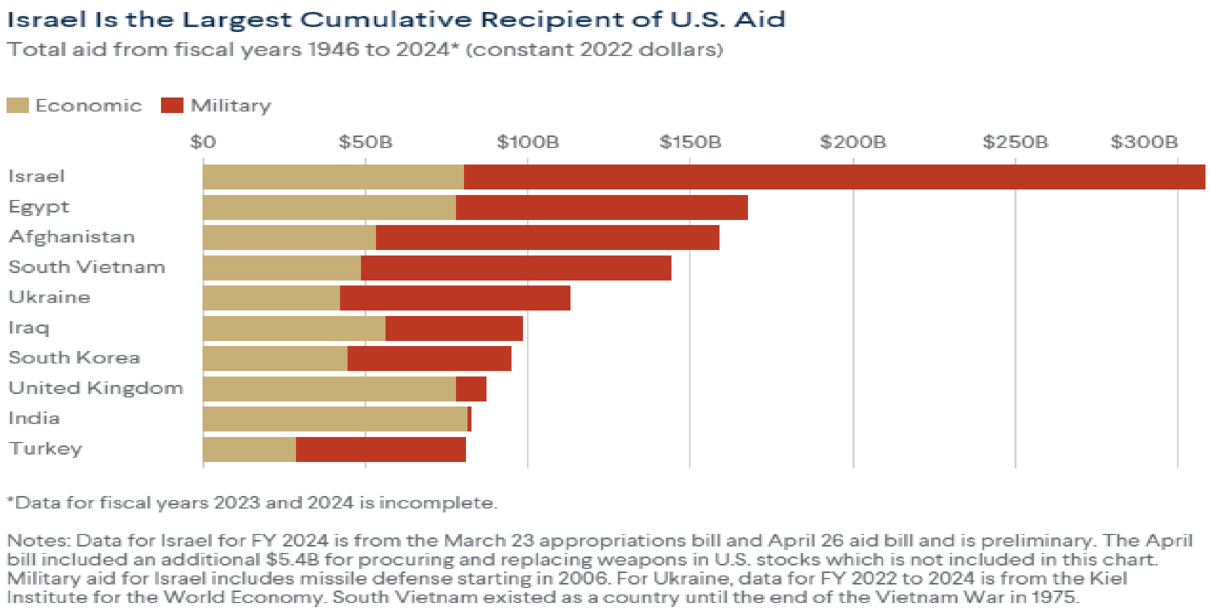
economic and social consequences impacting various aspects of life under Israeli occupation. *Calcalist* based its estimates on data from the Bank of Israel, indicating that the total includes "direct security costs, substantial civilian expenses, and revenue losses." However, the newspaper emphasized that these figures do not account for all financial aspects associated with the war.

Calcalist highlighted this as a reflection of the mismanagement of the war on Gaza, noting that it necessitates "***a significant increase in the Israeli Defense Ministry's budget over the next decade.***" This future budget will likely cover the procurement of additional planes, helicopters, armored personnel carriers, vast quantities of weapons and ammunition, and investments in human resources, specifically the Israeli soldiers themselves. The newspaper further pointed out that the Israeli army's failures in the war on Gaza extended beyond financial losses, encompassing significant human casualties. The rising number of dead and injured has also taken a psychological and emotional toll on the families and relatives of the wounded, who continue to endure the mental and emotional effects of the war.

Global Financial Backing for Israel during the Gaza War

America

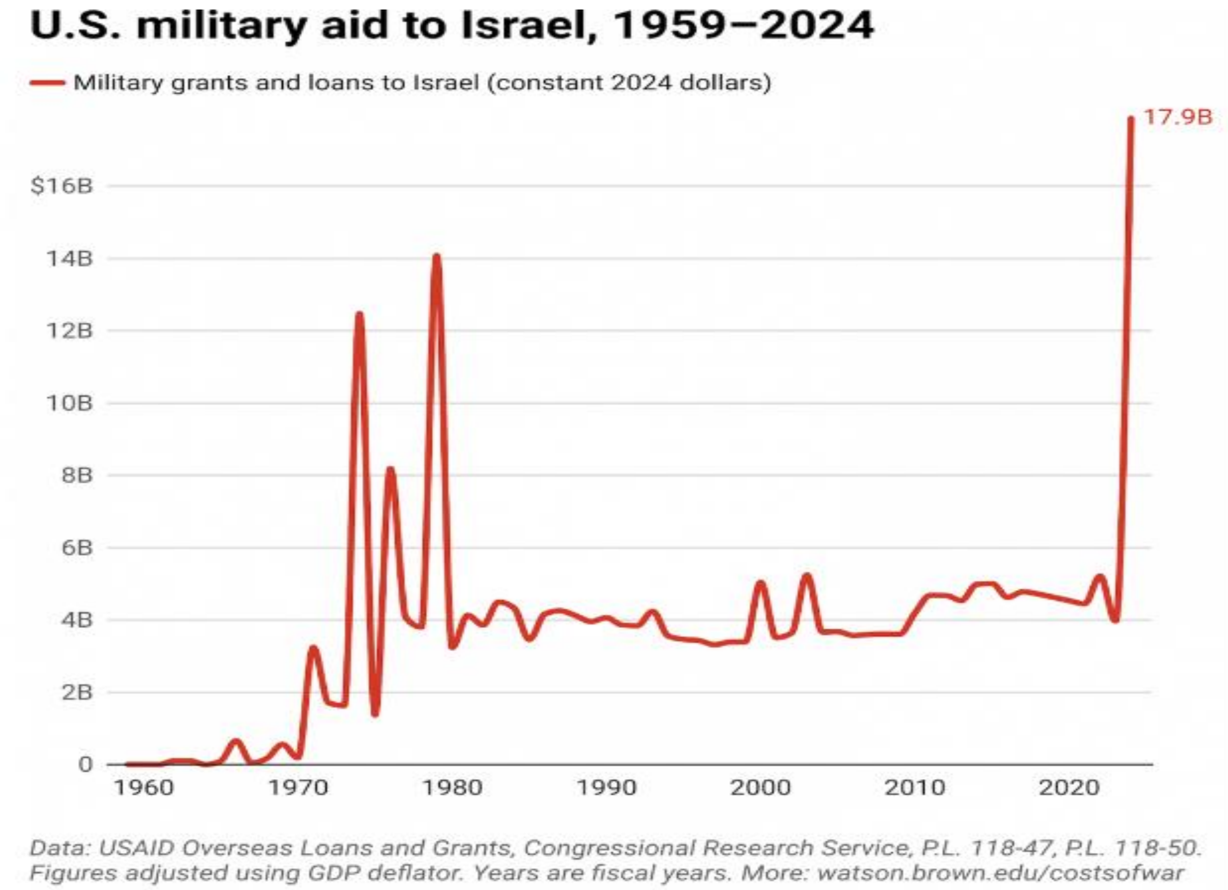
Since its founding, Israel has been the largest cumulative recipient of U.S. foreign aid, receiving approximately $310 billion in total economic and military assistance when adjusted for inflation. While the United States has also extended substantial aid packages to other Middle Eastern nations like Egypt and Iraq, Israel remains a unique case. From 1971 to 2007, the U.S. provided significant economic assistance to Israel, but nearly all current aid is directed toward supporting Israel's military, the most advanced in the region. Under a memorandum of understanding (MOU), the U.S. has committed to providing Israel with $3.8 billion annually through 2028.



Since the onset of Israel's war with Hamas on October 7, 2023, the United States has passed legislation providing at least $12.5 billion in direct military aid to Israel. This includes $3.8 billion authorized by a March 2024 bill (consistent with the current MOU) and $8.7 billion from a supplemental appropriations act in April 2024. However, analysts from Brown University—Linda J. Bilmes, William D. Hartung, and Stephen Semler—have estimated that U.S. military aid to Israel during this period totals $17.9 billion. This higher figure factors in the U.S. Defense Department's expenses for replenishing the weapons stock supplied to Israel.

[3]The report states that the $17.9 billion in military aid provided to Israel since the start of the Gaza war a year ago marks the highest annual total on record.

3 https://watson.brown.edu/costsofwar/files/cow/imce/papers/2023/2024/Costs%20of%20War_US%20Support%20Since%20Oct%207%20FINAL%20v2.pdf


U.S. military aid to Israel, 1959–2024
Military grants and loans to Israel (constant 2024 dollars)
17.9B
$16B
14B
12B
10B
8B
6B
4B
2B
0
1960
1970
1980
1990
2000
2010
2020
Data: USAID Overseas Loans and Grants, Congressional Research Service, P.L. 118-47, P.L. 118-50.
Figures adjusted using GDP deflator. Years are fiscal years. More: watson.brown.edu/costsofwar

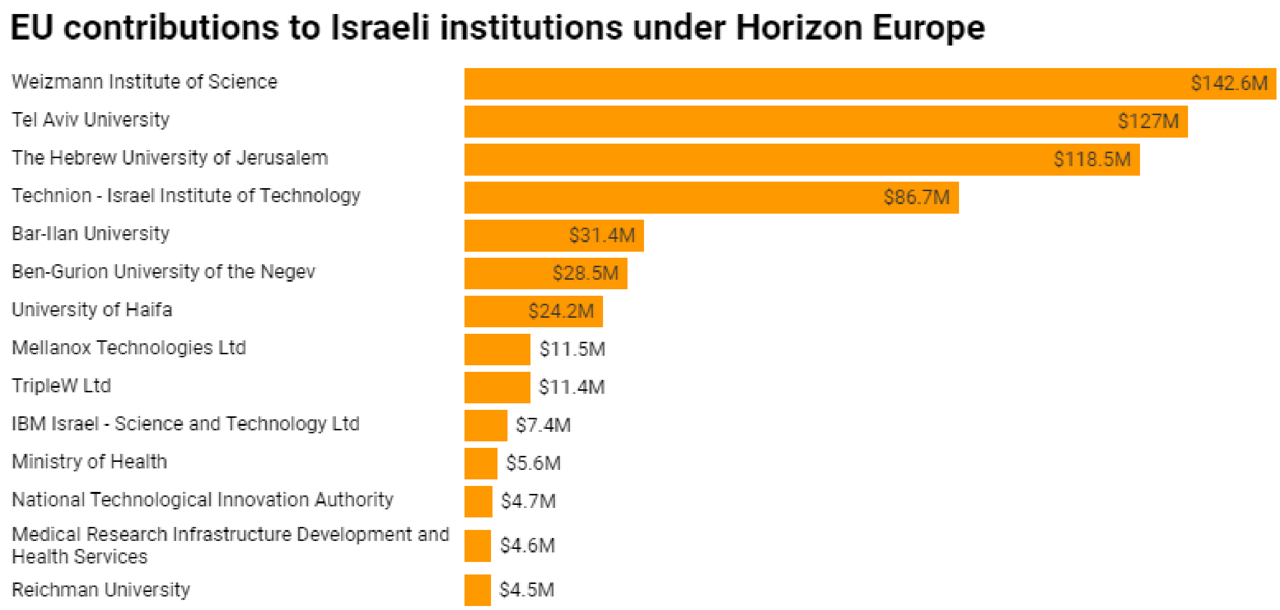
European Union and Israel

On October 7, as Israel launched its latest offensive against Gaza in response to Hamas's incursion into southern Israel, the European Union's stance was immediately evident.

"Israel has the right to defend itself – today and in the days ahead," European Commission President Ursula von der Leyen wrote on X, accompanied by an image of her office's headquarters illuminated with Israel's flag. *"The European Union stands with Israel."*

[4]*According to data gathered by the European Commission and analyzed by Al Jazeera, since October 7, the EU has allocated over 238 million euros ($250 million) to Israeli institutions. This includes 640,000 euros ($674,000) granted to Israel Aerospace Industries (IAI), a leading aerospace and aviation manufacturer that supplies the Israeli military.*

[4] https://www.aljazeera.com/news/2024/12/18/eu-horizon-funding-israel



Germany

Germany has been a significant arms supplier to Israel, providing equipment and weapons worth 326.5 million euros ($353.7 million) in 2023. German Chancellor Olaf Scholz approved the transfer of two IAI Heron TP UAVs from the German Army and announced plans to supply approximately 10,000 tank shells to Israel. Additionally, Germany has supplied components for air defense systems and communication equipment, along with 3,000 portable anti-tank weapons and 500,000 rounds of ammunition for automatic and semi-automatic firearms. Most export licenses covered land vehicles and technology for weapon development, assembly, maintenance, and repair. While arms exports from Germany to Israel slowed in 2024 due to legal challenges, data from the German Foreign Ministry in October 2024 revealed $100 million in authorized military exports over the previous three months.

UK

Israel utilized British-supplied weapons during the war. Approximately 15% of the components in each Israeli-owned F-35 fighter jet are produced by British companies, including BAE Systems. Since 2008, the UK has approved arms export licenses to Israel worth £574 million, with £42 million granted in 2022.

France

In late October 2023, France supplied Israel with 100,000 rounds of machine gun ammunition.

India

India reportedly exported rockets, drones such as the Elbit Hermes 900, explosives, and other military equipment to Israel during the Gaza conflict. A cargo ship carrying over 30 tons of such supplies for the Israeli Defense Forces was reported off the coast of Spain. The ship, which departed from southeastern India, was bound for Ashdod but was denied port access by Spain.

Canada

In early 2024, Canadian Prime Minister Justin Trudeau confirmed that Canada had authorized military exports to Israel during the initial stages of the Israel–Hamas war, approving at least $21 million in export licenses. These included bombs, torpedoes, rockets, explosive devices, and related equipment. By August 2024, the United States had arranged a $20 billion arms deal with Israel, including $60 million worth of munitions manufactured in Canada.

Italy

Between October and December 2023, Italy exported €2.1 million in weapons and ammunition to Israel.

Serbia

By September 2024, Serbia's state-owned arms exporter had sold €23 million worth of weaponry to Israel.

Netherlands

The Netherlands initially permitted the export of parts for the F-35. However, a Dutch court later prohibited all such exports. Despite this, Dutch-made parts reportedly continued to reach Israel through the United States.

Conclusion

This widespread support indicates that Israel's military capabilities are significantly augmented by international aid, enabling it to sustain prolonged conflicts. However, the scale and breadth of this assistance also reveal Israel’s reliance on external resources to maintain its military edge, particularly when facing well-armed adversaries like Hamas. The data clearly shows that Israel cannot fight its enemies alone and heavily depends on international financial, technological, and logistical backing to sustain its defense efforts. This reliance underscores the critical role of global partnerships in shaping Israel's ability to navigate its ongoing security challenges.

Israel’s Mounting Fiscal Challenges Amid Conflict

The ongoing war has led to a sharp increase in government spending. Elliot Garside, a Middle East expert at Oxford Economics, noted that military spending rose by 93% in the last three months of 2023 compared to the same period in 2022. In 2024, monthly data shows that military spending will likely double compare to the previous year. Most of this money is being spent on reservist wages, artillery, and Iron Dome interceptors, with much of it funded through domestic debt. In addition to this, Israel has received $14.5 billion in extra funding from the United States this year, on top of the $3 billion in annual aid it regularly receives.

So far, there haven’t been major budget cuts to areas like healthcare or education, but Garside suggests that such cuts may come after the conflict. Israel’s economy is expected to grow slowly, at just 1.5% this year, according to Oxford Economics. The combination of slow growth and rising deficits will increase Israel's debt, making borrowing more expensive and potentially reducing investor confidence.

Fitch Ratings predicts that Israel will increase its military spending by 1.5% of GDP compared to before the war. This will push the public deficit higher, with debt expected to stay above 70% of GDP in the medium term. Fitch also projects that Israel's budget deficit will reach 7.8% of GDP in 2024, up from 4.1% in 2023. ***Finance Minister Bezalel Smotrich disagrees, claiming the deficit will drop to 6.6% this year and promising a responsible budget to improve***

the country's credit rating. However, there are concerns about delays in passing this budget, which could lead to snap elections if not approved by March 31, 2025.

Central Bank Governor Amir Yaron has urged Prime Minister Netanyahu to approve the 2025 budget quickly to avoid further instability in financial markets. Fitch believes Israel will likely use a mix of spending cuts and tax increases to address the fiscal challenges. However, political divisions and ongoing military needs could make it hard to manage the budget effectively.

Fitch also warned that the Gaza conflict could continue into 2025 and may even expand to other regions, creating further economic and political uncertainty.

Labor Market of Israel after war

Overview

The war has significantly impacted Israel's labor market, with key disruptions due to the mobilization of about 8% of the workforce. The reserve call-up, mostly involving young men aged 21 to 45, disrupted industries like manufacturing, high-tech, and agriculture. A particular strain was felt in construction due to the departure of foreign laborers and the barring of Palestinian workers, while high-tech and financial sectors were more adaptable, with many workers shifting to remote work. Although the unemployment rate remains low, growth has slowed due to a shortage of workers, especially Palestinian laborers, who have historically played a critical role in construction and agriculture. The absence of around 100,000 Palestinian workers has led to delays in construction projects and increased housing prices. The agriculture sector has also been affected, with reduced output and rising prices.

Despite the challenges, the economy managed to function with the help of tens of thousands of volunteers filling in for missing workers. However, these volunteers lacked professional experience, and their long-term ability to maintain productivity remains uncertain. The labor market continues to face challenges, with a growing dependency on Palestinian workers and internal unrest caused by the closure of work permits, which adds economic risks.

Impact on Key Sectors

Small Businesses

Small businesses have been hit hard by the war, with 2024 expected to mark the first time in years that more businesses will close than open. This shift is negatively affecting the overall Israeli economy.

High-Tech

[5]*A survey by the Israel Innovation Authority revealed that 50% of high-tech startups in Israel may run out of funds within six months. Due to financial pressures, around 20% of companies reported relocating activities or staff overseas, while approximately 40% stated they had intentionally reduced their cash burn rates to cope with the challenges.*

High-tech, a key driver of Israel's economy, has been significantly impacted. The war, combined with the global economic crisis and the judicial overhaul, has led to reduced foreign investment. As a result, some high-tech companies have relocated abroad, and the industry's outlook has worsened since the start of 2023.

Agriculture

The war has severely affected agriculture, particularly in areas along the Gaza and Lebanon borders, which are major sources of vegetables like potatoes, carrots, and onions. The sector is also facing a shortage of workers, raising concerns about food security and the need for rehabilitation of farmers in these regions to maintain local production.

Construction

The construction industry, which contributes around 6.5% to the economy, has suffered due to a significant reduction in the availability of labor. The closure of work permits for around 100,000 Palestinian workers and the return of 15,000 foreign workers has disrupted construction projects.

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[5] https://www.calcalistech.com/ctechnews/article/hywxcnqvke

Industry

Industry has been impacted by the shortage of workers caused by military mobilization. While sectors like food, security, and health products have seen increased demand, other industries, particularly construction-related manufacturing, have been affected by a decrease in demand due to stalled construction projects. Despite this, many factories continue operating as usual.

Tourism

Tourism has sharply declined, and hotels have temporarily hosted displaced Israelis. With the ongoing conflict, there is concern that the tourism sector may continue to suffer long-term, further hurting the economy.

AirTravel

Air travel has become unstable as many foreign airlines suspended flights, affecting both passenger and cargo services. Maritime cargo has also become more expensive due to the increased risks and fewer vessels visiting Israeli ports.

Energy

The war initially caused the shutdown of the Tamar gas field due to security concerns, resulting in significant economic losses of about NIS 800 million per month. This affected the Israel Electric Company, forcing a reliance on coal and solar power, which increased air pollution. However, energy supply stabilized after a month, although the Leviathan gas field couldn’t fully compensate for the loss of Tamar’s output.

PrivateServices

The private services sector, particularly recreation and dining, has seen a decline due to reduced consumer demand, further exacerbating the economic impact of the war.

Post-War Economic Forecast for Israel: Navigating Recovery and Risks

Overview

The ongoing conflicts in the Middle East, which started in October 2023, are expected to continue influencing economic activity. Projections show GDP growth of 2.4% in 2025, increasing to 4.6% in 2026. Military spending remains high, driving government demand. By mid-2025, the business environment is anticipated to stabilize somewhat, enabling growth in exports and private consumption. However, labor shortages are slowing down construction activities and pushing prices higher.

Significant risks remain. If the conflicts escalate further, it could harm economic activity and worsen the already large fiscal deficit. On the other hand, a quick resolution of tensions could lead to a surge in demand, as people and businesses resume delayed activities.

To address these challenges, fiscal policies must focus on gradually reducing the deficit. Governments should consider increasing revenues to cover the permanently higher defense costs while ensuring spending is directed toward critical areas such as research, education, and public investments.

Meanwhile, monetary policy should remain strict to control inflation and bring it back to target levels. Addressing labor shortages through policies, such as allowing more foreign workers and reopening work permits for Palestinians, could help ease construction bottlenecks and reduce pressure on prices.

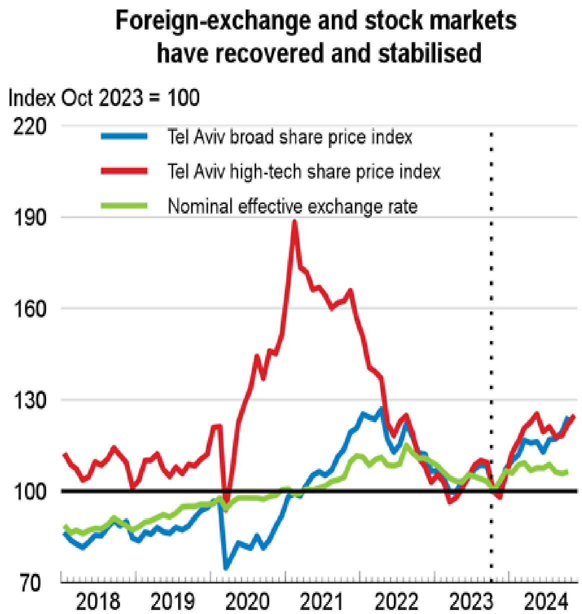
This analysis highlights the delicate balance needed to manage risks and foster economic recovery amidst ongoing uncertainties.

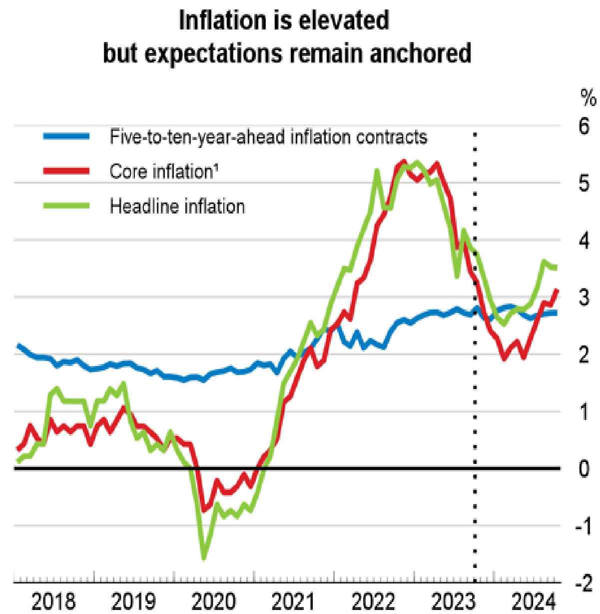
Economic Outlook Clouded by Ongoing Conflicts

The ongoing conflicts have significantly affected Israel's economy. Military activities have surged, causing government spending to rise by over 20% compared to pre-war levels in the second half of 2024. While private consumption recovered quickly after the events of October 7, 2023, it has since grown slowly due to weak consumer confidence in October 2024.

On the other hand, business confidence has been relatively strong, with many businesses showing moderate optimism, and the local stock markets have fully bounced back. However, labor shortages in the construction sector have slowed investment. The suspension of work permits for Palestinians (who made up 4% of the workforce before the war) has resulted in only a small increase in foreign workers, now making up just 0.4% of employment. Additionally, rocket attacks in the northern regions have disrupted industrial and agricultural production. Supply issues have pushed inflation up from 2.5% to 3.5% between February and October 2024.

Foreign trade has also suffered. Attacks on ships in the Red Sea have made shipping more expensive, and fewer airline connections have hindered trade in services. High-tech shares, which were recovering earlier, have stalled due to rising tensions since mid-2024, affecting the high-tech sector. Meanwhile, foreign tourism to Israel remains almost non-existent.





[1] Note: The dotted lines correspond to October 2023.
1. Excluding food and energy.
Source: Bank of Israel; Tel Aviv Stock Exchange; OECD Price Statistics database; and OECD Financial Markets database.

Israel	2021	2022	2023	2024	2025	2026
	Current prices NIS billion	Percentage changes, volume (2015 prices)				
GDP at market prices	1 591.2	6.2	1.9	0.6	2.4	4.6
Private consumption	775.5	7.4	-0.9	4.0	3.4	5.4
Government consumption	350.5	0.1	8.0	12.5	0.8	-0.1
Gross fixed capital formation	377.6	10.7	-1.3	-8.1	7.1	4.1
Final domestic demand	1 503.6	6.6	1.0	3.2	3.6	3.7
Stockbuilding[1]	30.8	0.7	-0.5	-0.2	0.1	0.0
Total domestic demand	1 534.4	7.2	0.5	2.9	3.6	3.7
Exports of goods and services	463.9	8.3	-0.9	-6.0	1.4	8.5
Imports of goods and services	407.1	12.1	-6.6	-1.4	3.6	4.9
Net exports[1]	56.8	-0.7	1.6	-1.5	-0.5	1.1
Memorandum items						
GDP deflator	_	4.9	4.3	5.2	3.1	2.7
Consumer price index	_	4.4	4.2	3.1	3.6	2.9
Core inflation index[2]	_	4.0	4.2	2.6	3.5	2.9
Unemployment rate (% of labour force)	_	3.8	3.4	3.0	2.5	2.0
General government financial balance (% of GDP)	_	0.4	-4.1	-7.5	-5.7	-4.8
General government gross debt (% of GDP)	_	60.1	61.9	66.3	68.6	68.9
Current account balance (% of GDP)	_	3.9	4.5	3.5	2.8	3.6

1. Contributions to changes in real GDP, actual amount in the first column.
2. Consumer price index excluding food and energy.
Source: OECD Economic Outlook 116 database.

Growth Outlook

Economic growth is expected to improve, reaching **2.4% in 2025** and **4.6% in 2026**. Over time, the drivers of demand will shift:

- **Exports:** Export growth, including high-tech services, is expected to pick up gradually, especially in the second half of 2025.
- **Private Consumption:** Consumer spending is likely to follow a similar recovery path.
- **Government Spending:** While government spending has supported growth so far, it is expected to become more restrictive in the future.
- **Investment:** Investments, particularly in construction, remain limited due to ongoing labor shortages.

Inflation is expected to rise to **3.6% in 2025**, partly due to an increase in VAT, but should ease to **2.9% in 2026** as supply problems improve.

Risks to Growth

There are significant risks to the economic outlook:

- **Downside Risks:**
  - If conflicts escalate again, it could harm economic activity and worsen public finances.
  - A loss of confidence among foreign investors might increase government borrowing costs and weaken the currency.
- **Upside Risks:**
  - If the conflicts de-escalate faster, it could release pent-up demand from both local and foreign investors, driving a quicker recovery and improving public finances.

Fiscal and Structural Reforms for Growth

Reforms are crucial to strengthen growth:

- **Monetary Policy:** Inflation is nearing the top of the 1-3% target range. If inflationary pressures grow or fiscal plans are not implemented effectively, interest rates may need to rise further.
- **Fiscal Reforms:**

  Introduce permanent changes, such as removing VAT exemptions and cutting subsidies that discourage people from working. Avoid temporary measures, such as freezing tax brackets or allowances, as they are easier to reverse.

- **Labor Market Improvements:**

  Reopen work permits for Palestinians to address labor shortages in construction. Remove subsidies that discourage ultra-Orthodox men from working, and ensure all students receive a core education to improve skills and productivity.

- **Environmental Policies:**

  Increase carbon pricing to promote decarburization and a more sustainable economy.

Conclusion.

In conclusion, Israel's economic recovery shows promising prospects, if the conflict stops, with growth expected to reach 2.4% in 2025 and 4.6% in 2026. However, significant challenges remain, including persistent conflict in Gaza and tensions with Hezbollah and Yemen which has resulted in halt in agricultural work and industries to stop due to constant firing and displacement followed by delayed shipments or halt in shipments from Red Sea, causing inflation to rise. The damage to local businesses and international calls for boycotting trade and relations with Isarel could also be another big challenge with the way situation is prevailing in Palestine. Additionally, shortage in labor markets is also in disturbing factor for Israel's economy as thousands have been called to join armed forces of Israel. The Israeli war has caused deaths of 51,000 people and damaged Israel's soft image at global level. A balanced approach is essential to overcome these hurdles. Fiscal reforms, such as removing inefficient subsidies and broadening the tax base, will strengthen public finances while addressing long-term spending needs. Labor market improvements, including reopening work permits and increasing workforce participation, particularly among ultra-Orthodox men, can enhance productivity and support economic expansion. Additionally, maintaining a prudent monetary policy will be key to controlling inflation and ensuring financial stability. Environmental policies, such as increasing carbon pricing, will promote sustainability and resilience in the economy. By implementing these measures, Israel cannot only mitigate the risks but also capitalize on opportunities for a more robust, inclusive, and sustainable economic future. But, this depends on the situation in the Gaza Strip and how this unfolds specially the ceasefire with Lebanon and how trump administration reacts to the conflict and how the issue of the ceasefire with Gaa goes.

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