

Special Report:
**How Would the Fall or
Weakening of the Iranian
Regime Affect Hezbollah in
Lebanon?**
A Scenario Analysis

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Executive Summary

How would the fall or weakening of the Iranian regime affect Hezbollah in Lebanon?

The regional campaign that began in March 2026 constitutes a strategic turning point for Hezbollah, transcending a standard military conflict. The combination of military attrition in Lebanon, damage to its regional supply routes, and the weakening of Iran creates overall systemic pressure, undermining not only its operational capabilities but also the civilian-economic envelope that allows Hezbollah to operate as a "state within a state."

Against this backdrop, two primary strategic trajectories are emerging. In the scenario of a weakened Iran (*de facto*, the current situation today), Hezbollah does not collapse but adapts: it deepens its grip on Lebanon, reduces external dependence, transitions to structural decentralization, and strengthens local legitimacy through "Lebanonization". Simultaneously, it compensates for the decrease in resources by strengthening the ideological component and expanding alternative funding sources, including a shadow economy.

Conversely, a scenario of the total collapse of Iran places Hezbollah before a multi-domain existential crisis: the loss of economic, organizational, and ideological support undermines the foundations of its activities and harms its ability to preserve the "state within a state" model. This situation is expected to lead to an erosion of control mechanisms, the weakening of civilian infrastructure, and an increased risk of internal fragmentation.

Meanwhile, the organization would be required to choose between political integration and military radicalization, with both alternatives carrying risks of internal escalation and damage to its legitimacy. Unlike the weakened Iran scenario, which allows for adaptation, a total collapse of the Iranian regime constitutes a trigger for deep structural and identity-related destabilization, which is liable to lead in the long term to significant attrition and even the gradual disintegration of the organization.

In both scenarios, the weakening of Hezbollah does not necessarily lead to stability, but may create a vacuum in which regional and other actors will attempt to expand influence. Simultaneously, there is also the possibility of violent escalation, an attempt by Hezbollah to take over Lebanon, and the ignition of a civil war.

The regional campaign that began in March 2026 is not just another round of escalation between Israel and Hezbollah, but a strategic turning point that shakes the foundations of the organization's operational model. A combination of direct military attrition in Lebanon, damage to regional supply infrastructures, and the profound weakening of Iran – the central patron – places Hezbollah before a historical dilemma: deep adaptation or structural disintegration.

The central conclusion arising from the analysis is that Hezbollah's strength stems from the tight integration between its various dimensions – military, civilian, political, and ideological – but its vulnerability is also derived from that exact same structure. When one component is eroded, the effect spreads to the entire system. In the scenario of a weakened Iran, the organization manages to contract and adapt while deepening its internal control; in the scenario of an Iranian collapse, the entire system enters an identity crisis that may lead to gradual disintegration.

Hence, the central question is not only the extent of the damage to Hezbollah, but whether it will succeed in preserving the hybrid model upon which its power is based. The future of the organization will not be decided solely in the combat arena, but in its ability to preserve the connection between power, society, and ideology – the very fabric that allows it to operate not just as an organization, but as a complete system.

Alongside the fundamental differences between a scenario of a weakened Iran and a total collapse of the regime, in both there exists a strategic point of intersection: the potential for internal violent escalation by Hezbollah and an attempt to establish direct or de facto control in Lebanon.

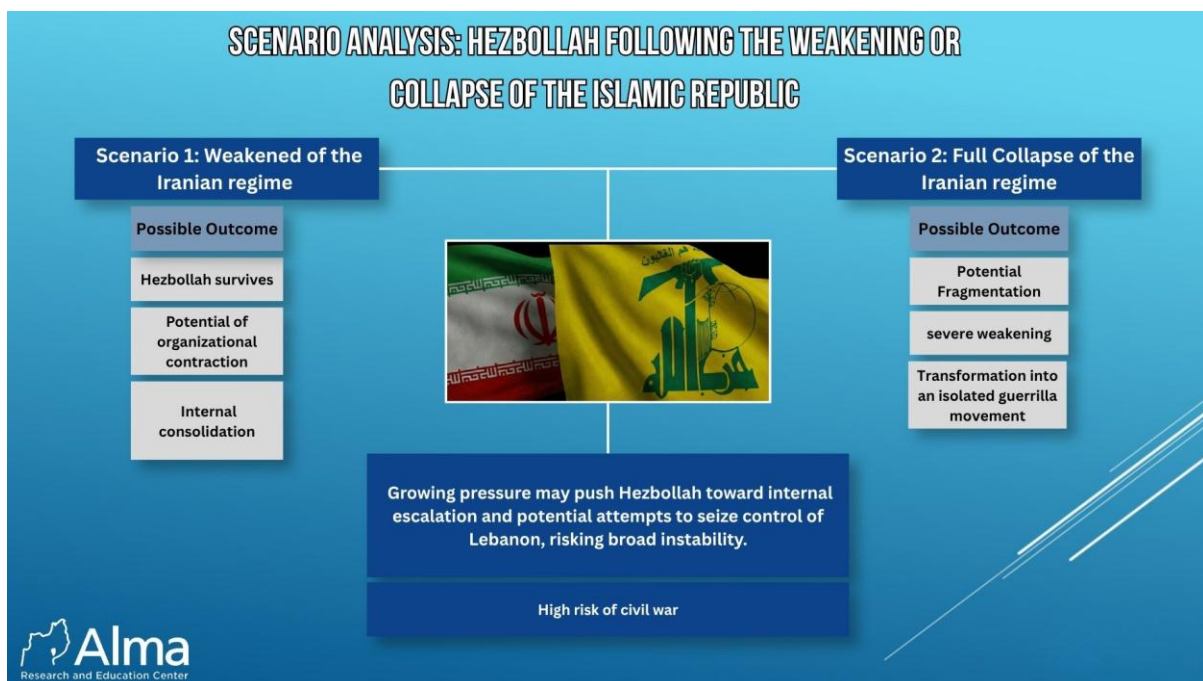
In the scenario of Iran's weakening, growing pressure from political elements and international pressures to disarm the organization may push it to rely more on military force to preserve its status, and even act against Lebanese state institutions or internal rivals. In the scenario of an Iranian collapse, the loss of the external anchor may accelerate a transition from a strategy of indirect influence to an active move of takeover, while exploiting its grip on state institutions, civilian infrastructures, and security power centers.

In both cases, the primary risk is a deterioration into a broad internal conflict, to the point of the disintegration of state mechanisms and the deepening of instability in Lebanon, i.e., civil war.

The Scenarios:

Domain	Scenario 1: Weakened Iran (But exists)	Scenario 2: Total Collapse of Iranian regime
Nature of Change	Structural change and adaptation - Hezbollah changes shape and deepens internal grip	Deep strategic rupture and essential change - Hezbollah enters an existential crisis that could lead to disintegration
Military Arena	Reduced weapons supply and funding Shift toward domestic production and decentralization of power Transition from hierarchical force to decentralized guerrilla structure Strategy: attrition, hit-and-run, force preservation	Collapse of Iranian supply networks Breakdown of command structure Shift to localized guerrilla/militia model Reduced long-term operational capability
Economic Arena	Decline in Iranian funding Expansion of shadow economy Growth of transnational organized crime (drugs, money laundering, crypto) Increased economic dependence of the Shiite population	Loss of state funding Reliance on limited criminal economy Competition over local revenue sources Decline in force-building capacity
Political Arena	Deepening penetration into state institutions ("controlled Lebanonization"). Attempt to strengthen Lebanese legitimacy. Use of internal force - possible but limited. Possibility of full political integration: low - maintaining a hybrid model. Institutional arena ("state within a state") - strengthens as a replacement for external dependence.	Transition to a survival struggle; contraction or radicalization. Attrition in legitimacy; survivalist attempt. Use of internal force - higher probability of using force to preserve status. Possibility of full political integration: increases – including the possibility of giving up the military wing. Institutional arena ("state within a state") - disintegrates and becomes a burden.

Domain	Scenario 1: Weakened Iran (But exists)	Scenario 2: Total Collapse of Iranian regime
Social Arena	<p>Preservation of the "Resistance Society" with adjustments.</p> <p>Welfare and service systems contract but function.</p>	<p>Legitimacy crisis and erosion of the base.</p> <p>Welfare and service systems - collapse or significantly weaken.</p>
Ideological Arena	<p>Relative stability; continued affinity for Iran.</p> <p>Resistance narrative - strengthens as compensation for material weakness.</p>	<p>Deep identity crisis.</p> <p>Resistance narrative - radicalizes but erodes without a material and ideological basis.</p>
Internal Lebanese Arena	<p>Increasing tension.</p> <p>Potential for deterioration into civil war.</p>	<p>Change in the balance of power; direct challenge to Hezbollah.</p> <p>Potential for deterioration into civil war.</p>



General Background

Hezbollah's joining of the direct campaign against Israel on March 2, 2026, in response to the elimination of Iran's Supreme Leader Ali Khamenei and the launch of the American-Israeli Operation Epic Fury (Roaring Lion), marks a profound strategic turn. For the first time, the organization faces a combined campaign whose goal is not merely damaging its capabilities, but the systematic dismantling of its power infrastructures – military, economic, civilian, and political – as part of a doctrine of active prevention and systemic decapitation.

Since the outbreak of fighting, Hezbollah has launched over 6,500 rockets and unmanned aerial vehicles toward Israel, including intensive fire from areas south of the Litani River – contrary to the 2024 ceasefire understandings. This move reflects the preference for the Iranian interest over Lebanon's stability, as well as the organization's choice of ideological loyalty to the Iranian axis even at the cost of its survival and harm to the Shiite population it claims to protect.

In response, Israel acted to systematically erode Hezbollah's capabilities through a broad aerial campaign and significant ground action in southern Lebanon. To date, thousands of terror targets have been attacked, hundreds of launchers destroyed, and thousands of operatives eliminated, including senior commanders of Hezbollah and the Revolutionary Guards (who operated in Lebanon on behalf of the Quds Force's Lebanon Corps). Since the ceasefire (April 18), the systematic attrition is becoming undermined due to the fact that Israel refrains from attacking in the Beqaa area (an area where even before the ceasefire only 10 percent of attacks were directed) and in Beirut. We note that Hezbollah's command and control arrays and logistical rear are concentrated in the Beqaa and Beirut areas.

The ground fighting, which focuses among other things on clearing the area south of the Litani and exposing underground infrastructures, systematically reveals the integration of military infrastructures within the civilian environment. Israeli strikes are also directed against components of the integrated civilian infrastructure, out of the understanding that these constitute an inseparable part of the organization's force-activation mechanism.

A deep strategic shock in the regional arena joins the military attrition against Hezbollah. The fall of the Assad regime in Syria and the rise of a hostile Sunni regime headed by Ahmed al-Sharaa severely (but not totally) damaged the Iranian logistical corridor. Syria, which served for years as a central weapons transfer route for Hezbollah, became a blocking factor operating against Hezbollah to locate and thwart weapons smuggling. Simultaneously, the economic and military pressure on Iran – which includes damage to Iranian oil infrastructures and a naval blockade – is expected to limit the Iranian ability to continue funding its proxies in the region. This weakening is also reflected in damage to Hezbollah's economic infrastructures, chief among them financial institutions such as Al-Qard al-Hasan, which served as a central anchor for establishing economic dependence among the Shiite population.

However, Hezbollah's strength does not rest solely on its military capabilities, but on a broad hybrid "state within a state" model that integrates military, civilian, and political wings into a single coordinated system. At the heart of this model stands a broad civilian infrastructure – welfare, health, education, and finance – supported by Iran and serving not only to provide services but to create dependence, shape collective identity, and establish political loyalty within the framework of the "Resistance Society" concept. By providing responses to the actual needs of the Shiite population, alongside control over the public narrative, the organization manages to deepen its social grip and establish a captive audience.

This civilian infrastructure operates while intentionally blurring the lines between civilian and military, and constitutes an inseparable part of Hezbollah's force-activation array. Ostensibly civilian organizations integrate into the establishment of military infrastructures, logistical support for fighters, and the instillation of the culture of sacrifice, while the financial system creates an alternative economy that strengthens dependence and loyalty. The education system also plays a central role in consciousness engineering and ensuring the organization's continuity, while political activity anchors its power within state institutions and allows it to influence from inside and outside.

All these systems are connected through the resistance narrative, which presents Hezbollah as the defender of Lebanon and an alternative to the weak Lebanese state. Thus, a model is created in which society itself is mobilized and serves as a strategic force multiplier: a combination of material dependence, ideological identity, and political control, allowing the organization to preserve its power over time and serve as a central platform for Iranian influence in Lebanon.

Against this backdrop, Hezbollah faces continuous tension between its loyalty to Iran and its own survival considerations. Iranian support, which includes significant financial injections, continues to be a central factor in its existence, but its weakening forces the organization to adapt its operational patterns.

Scenario One - Hezbollah under a weakened Iranian regime (a continuation of the current situation):

In a scenario where the Ayatollah regime in Iran survives Operation "Epic Fury," but emerges beaten, isolated, and partially paralyzed, a scenario that is de facto the current situation these days, Hezbollah faces a process of long-term organizational and strategic weakening. The annual Iranian financial influx, which stood at about \$700 million to a billion dollars until the Swords of Iron war (October 2023), may be significantly harmed due to the destruction of Iranian energy infrastructures, the boycott and naval blockade in the Strait of Hormuz, and Tehran's enormous reconstruction costs, estimated at hundreds of billions of dollars at least. This is occurring while Iran is coping with an economy and civilian needs that even before the current war reached a state of dysfunction and hyperinflation (however, it should be remembered that an agreement with the US would inject a lot of money into the Iranian coffers).

The dramatic drop in available funding may be accompanied by a decline in weapons supply from Iran, a pattern that has already begun due to changes in Syria. This reality could force Hezbollah to change its force-building concept, and transition to increased attempts at domestic production and "bringing the factory home" (as has already begun to happen, and was covered by a [previous Alma Center report](#)). Without the ability to easily import the stock of rockets, UAVs, and advanced air defense components lost in Syria and Lebanon, Hezbollah will be further forced to turn to munitions production through local means, relying on self-production in underground workshops. In southern Lebanon, the hierarchical Hezbollah army model with brigades, regional units, and an invasion force led by the Radwan unit, may be replaced by a more decentralized guerrilla organization, divided into smaller and more autonomous terror cells operating with less central coordination.

Hezbollah's military strategy will become a strategy of attempting to exhaust IDF forces in southern Lebanon – an approach the organization developed back in the 80s and 90s during the years of the Israeli security zone in Lebanon, alongside force preservation efforts. Hezbollah might avoid broad offensive operations and focus on using rockets, anti-tank missiles, mortars, and explosive drones against IDF forces in the new strip areas and "hit and run" tactics, in an attempt to create an image of continuous resistance while minimizing manpower losses. In this scenario, the organization's command and control will rely more on the initiatives of local field commanders.

Alongside the Israeli pressure, might the Lebanese Armed Forces (LAF) try to increase its enforcement efforts? These efforts are still highly doubtful, if they happen at all, due to the fact that most senior LAF commanders prefer to be accommodate Hezbollah, as well as the Shiite composition of about half of the Lebanese army, and a historical reluctance and fear of entering a significant conflict with Hezbollah. If, as a result of Israeli and international pressure, there is a rearrangement in the Lebanese army, only then could it be possible to expect an increase in anti-Hezbollah enforcement efforts.

Although the peace outline (as discussed in the historic talks in Washington between Israel and Lebanon) includes goals of implementing Lebanese sovereignty in all parts of the country and disarming the armed militias, while isolating Naim Qassem and the remaining Hezbollah leadership, in practice it is unclear how the Lebanese government will truly be able to realize these goals, if at all. This scenario, where the Lebanese state aspires to achieve a monopoly on force and weapons, is liable to create a direct conflict between Hezbollah and the Lebanese army.

The Economic Dimension: Strengthening the Model of a Transnational Organized Crime (TOC) Organization

Should the annual grant from Tehran be reduced, and the Al-Qard al-Hassan institution finds it difficult to return to its previous dimensions, Hezbollah will have to compensate for the loss of income, possibly through a dramatic expansion of the shadow economy model and strengthening and expanding its activities as a Transnational Organized Crime (TOC) organization.

Hezbollah's economic mechanism will rest on three pillars:

Income Channel	Current Nature of Activity and Scope of Influence	Transformations in the "Weakened Iran" Scenario
Captagon and Drugs Industry	Massive production of the synthetic Captagon drug in small, mobile laboratories across the Beqaa and northern Lebanon, and smuggling it to Europe, the Persian Gulf, and Africa. Additionally, collecting transit fees and logistical support for heroin smuggling networks.	Due to the blocking of the Syrian border by the al-Sharaa regime, the organization will be forced to rely more on maritime and aerial smuggling routes, utilizing low-signature collaborators.
Latin America (Trade-Based Money Laundering)	Close cooperation of Hezbollah's crime networks with large drug cartels (PCC in Brazil, Los Zetas in Mexico, FARC remnants) in the "Tri-Border Area" (Argentina, Brazil, Paraguay).	This hub may become a more significant source of income. The organization may attempt to launder hundreds of millions of dollars through used car trades, electronics, and document forgery. US Intelligence (DEA) is expected to increase its efforts to hit this network as part of a complementary campaign.
Digital Money Laundering and Extortion	Operation of underground financial systems (Hawala), fundraising via cryptocurrencies while posing as charities, and collecting business "protection money" from businesses in Lebanon and from the Shiite diaspora community worldwide.	Transforming the organization into an even greater economic and extortionate burden on the Shiite community itself to compensate for the loss of income from Iran.

The Geopolitical and Intra-Lebanese Dimension: The Strengthening of Turkey and the Growth of Sunni Power Centers (Hamas)

Iran's strategic weakening and the transformation of Hezbollah into a defensive force with a reduced Iranian budget (if at all) are factors that are liable to create a governmental and influential vacuum in Lebanon and the entire Middle East. The key state that identifies this vacuum and seeks to fill it aggressively is Turkey. Under the leadership of President Recep Tayyip Erdogan, Turkey sees itself as the leading Sunni power, and strives to convert the Shiite-Iranian hegemony in Lebanon and Syria with a Turkish presence and Sunni political influence. Erdogan, driven by an ideological orientation identified with the Muslim Brotherhood and the Milli Gorus movement, injects capital, diplomatic support, and organizational ties to strengthen these elements.

Note - The Milli Gorus movement was founded in the 1960s and emphasizes the importance of Islam as the basis for Turkish national identity, building independent Muslim power, and opposition to the West. Turkish President Erdogan began his political path within the movement and later left it to establish his current party (AKP), but his ideological roots remained tied to Milli Gorus.

The primary beneficiary of this Turkish intervention in the Lebanese arena is the Hamas movement. Following severe damage to Hamas's governmental and military capabilities in the Gaza Strip during the 2023-2025 war, and out of necessity stemming from pressures in certain Gulf states, the Hamas leadership abroad (including key figures like Khalil al-Hayya and Zaher Jabarin) shifted its center of gravity to Lebanon. In the Palestinian refugee camps in Lebanon (such as Ain al-Hilweh and Burj el-Shemali), Hamas has for a long time been establishing an independent army and significant terror infrastructures, while relying on political and financial ties with the Erdogan regime in Turkey.

In a scenario of a weakened Hezbollah, the organization's ability to enforce 'axis discipline' on Hamas and other Sunni factions erodes. Hamas, which has already shown certain signs of rhetorical detachment from Iran, is strengthening as an independent Sunni militia supported by a regional actor (Turkey) that is not committed at all to the Shiite interest, despite the close cooperation that occurred under the shared goal of destroying Israel. The connection Hamas is forging between itself and the Al-Jama'a al-Islamiyya movement (the Lebanese branch of the Muslim Brotherhood) in Lebanon, creates a Sunni Islamist-Jihadist political and military bloc.

Hamas no longer sees itself as a 'guest' in Lebanon, but as a 'landlord' in its area of residence and operation. In our understanding, Hezbollah has identified this and currently defines Hamas as one of the main potential threats against it in the internal Lebanese arena. Just as the IDF must act constantly to weaken Hezbollah, it must simultaneously do so against Hamas Lebanon.

The Political/Civilian Dimension - Adaptation, Contraction, and Deepening the Internal Grip

Iran's weakening does not necessarily lead to Hezbollah's collapse, but rather to a process of adaptation accompanied by radicalization: the organization reduces external dependence and shifts the center of gravity to internal control, while "Lebanonizing" the discourse and deepening the cognitive influence at the expense of material resources.

Within this framework, it continues to implement the Resistance Society model under changing conditions, where the Shiite society remains mobilized, the political arena becomes a focal point for the struggle over legitimacy, and the Lebanese state remains weak.

Hence, regarding its political status in Lebanon, the attrition of Iran does not necessarily weaken Hezbollah, but pushes it to reorganize as a more "Lebanese" player in its structure – while preserving and even sharpening the radical ideology and the operational capacity of the control mechanisms it built over the years.

This process is reflected in three main spheres – political, social, and cognitive – which together create an adaptation mechanism allowing the organization to preserve and even strengthen its relative power within Lebanon. This is done by utilizing the demographic advantage that has strengthened in recent decades – Shiites are nearly half of the citizens in Lebanon.

It should be remembered that despite the aforementioned analysis of the control mechanisms, they are still undergoing / will undergo change and the organization will become more decentralized in our assessment. It will be difficult for Hezbollah to operate as a centralized organization as it did during the Nasrallah era. Internal power struggles, which began after the elimination of Nasrallah and were reflected in both the military and political leadership, contribute to the organization's weakening and we are not certain that Naim Qassem has managed to establish his status as a leader who restores order.

The Political Arena: Controlled Lebanonization to Deepen Control

In the political arena, the most likely scenario is a process of turning inwards - deepening penetration into Lebanese state institutions and expanding control over them. Instead of relying primarily on military force and external backing, Hezbollah increases the use of state tools to preserve its power. This involves a transition from extra-state dominance to deeper hybrid dominance within the system.

This process includes a systematic attempt to generate Lebanese legitimacy – meaning, to present the organization not merely as a proxy of Iran, but as a national actor operating to defend Lebanon. Accordingly, there is a tendency to moderate the overt pro-Iranian rhetoric, reduce direct references to Tehran, and emphasize Hezbollah's role as the so-called state's defender against external threats. This is a calculated move aimed at expanding the legitimacy base beyond the Shiite audience, or at the very least minimizing the intensity of opposition from other groups.

Of course, the Israeli presence in the new security strip will serve as an excuse and ammunition for it and will become the chosen arena of 'struggle' to preserve the conflict with Israel and avoid disarmament as the 'defender' of Lebanon.

However, this process does not occur in a vacuum. Iran's weakening may encourage internal actors in Lebanon – political and sectarian – to challenge Hezbollah's status more directly. Demands for the organization's disarmament, alongside increased international pressure, could lead to a deep governance crisis. In such a situation, Hezbollah might shift from using political tools to increasing use of force, in order to preserve its status – a scenario that harbors the potential for internal escalation and even the outbreak of civil conflict.

Simultaneously, Iran's relative weakness may open a window of opportunity for the Lebanese state to strengthen its political independence. The possibility of tightening pragmatic ties with Western elements and even with Israel – even without full normalization – could politically isolate Hezbollah. If such a move is accompanied by a real improvement in state functioning and the provision of services to citizens, it may undermine one of Hezbollah's central power centers: the ability to present itself as an alternative to the failed state.

The Social Arena: Preserving the 'Resistance Society' Under Resource Constraints

In the social sphere, Hezbollah's main challenge stems from the gap between the reduction in resources and the need to preserve the dependency mechanisms upon which its power relies. Specifically in a state of scarcity, the importance of welfare, health, education, and civilian aid mechanisms increases. The organization is required to invest greater efforts in preserving the so-called Resistance Society – the mobilized social system built over years. It would have to do all of this under greater restrictions in the ability to fund these needs.

The likely response in this situation is strengthening existing civilian systems, even at the cost of reallocating diminished resources. Welfare, health, and education services continue to serve as a central tool for creating dependence and preserving loyalty.

At the same time, there is a tendency to increase ideological indoctrination, realizing that when the material resource shrinks, the cognitive resource becomes more critical.

However, the growing risk of internal erosion cannot be ignored. **A decline in the scope or quality of services could lead to quiet criticism within the Shiite community, a drop in motivation, and a feeling of disappointment. But at this stage, the cognitive control mechanisms – especially the education system and the resistance narrative – continue to block the development of an open rebellion.** It is a state of continuous friction: unease develops beneath the surface, but it does not translate into a direct political challenge.

In response to this threat, Hezbollah may turn to further ideological radicalization. That is, to compensate for material weakness by strengthening the value discourse: emphasizing concepts of *Shahada* (martyrdom), sacrifice, and the ongoing struggle; blaming external elements – the West, Israel, and regional actors – for the economic situation; and strengthening the combative collective identity. Thus, the narrative becomes a compensation mechanism, allowing the organization to maintain cohesion even under conditions of scarcity.

Scenario Two: Hezbollah on the Day After the Total Collapse of the Regime in Iran

The second, extreme, but possible scenario given the intensity of the blows Iran suffered in Operation "Epic Fury," describes a situation in which the Islamic Republic in Iran completely collapses further down the timeline. This collapse could stem from a chain reaction resulting from continued economic collapse, the inability to rehabilitate energy infrastructures, and popular uprisings across Iran alongside the rebellion of minority groups (such as the Kurds in northwestern Iran) and opposition forces.

For Hezbollah, the collapse of the regime in Iran is not merely a tactical event or damage to a logistical supply pipeline. It is the loss of the organization's existential and theological state basis. Hezbollah was born, shaped, and operated for decades in light of the doctrine of *Velayat-e Faqih* (Guardianship of the Islamic Jurist). The Supreme Leader of Iran was perceived not only as a political leader but as the highest religious authority on earth, and the Revolutionary Guards constituted the direct strategic compass of Hassan Nasrallah, and his successor, Naim Qassem. In the absence of an Islamic Republic in Iran, Hezbollah is left without a spiritual father, without supreme strategic leadership, and without cross-border religious legitimacy.

The collapse of the so-called Axis of Resistance model as a result of Iran's disintegration will force Hezbollah to execute a rapid and painful process of renewed Lebanonization. Without regional power backing, the organization will no longer be able to present itself as a forward arm of a cosmic struggle against Israel and the West. The only legitimacy it could try to draw will be from within local intra-Lebanese politics (except there, it has already been marked as the factor that brought about the country's destruction due to foreign interests).

The Military and Economic Dimension

At the operative level, the collapse of Iran means the paralysis of IRGC weapons smuggling and the crash of the proxy networks' architecture. At the same time, the disappearance of institutional Iranian support (including diplomatic cover and services of state banks like the Iranian Bank Sepah, attacked in Tehran) leaves Hezbollah's criminal networks and the economic resources of the Lebanese Shiites as a reduced basis for continued force buildup.

One of the possible scenarios in such a situation is the transformation of Hezbollah into an underground Jihadist guerrilla organization. The rigid hierarchical structure that characterized the organization may ultimately collapse in favor of field commanders who will take control of local yielding assets (pirate Captagon factories in the Beqaa, pinpoint smuggling routes into Syria or Jordan, and economic extortion means). All this will not lower the ideological motivation to continue fighting against Israel, but it will reduce the capability to do so over a long process of weakening.

The Iranian collapse scenario effectively eliminates the Ring of Fire project, a strategy centered on the attempt to surround Israel from all sides with armed militias synchronized from Tehran.

Simultaneously, continued Israeli control of the security strip south of the Litani in Lebanon will, in this scenario, make it difficult for Hezbollah to operate from this area and establish a military terror infrastructure for operations against Israel.

The Political/Civilian Dimension - Existential Crisis, Structural Dismantling, and the Struggle for Identity

A full collapse of the Iranian regime constitutes a strategic breaking point for Hezbollah, harming not only its funding and direction sources but the foundations of the model upon which it was built over decades. The organization is required in such a situation not only to adapt, but to redefine its identity, its sources of legitimacy, and its patterns of operation in Lebanon. In the political arena, it shifts from the status of a dominant player to a struggle for survival, where its ability to dictate the agenda weakens and it is required to defend its achievements. Simultaneously, processes of radicalization and the use of internal force may develop, or alternatively, an attempt to reintegrate into the Lebanese political system while reducing its affinity for Iran.

On the social level, the damage is the most severe: the collapse of Iranian support leads to a significant reduction in welfare, health, and financial services, which served as a central basis for the organization's legitimacy. The dependency of the Shiite population, which was a source of strength, becomes a point of weakness. In addition to an unstable ideological basis, political loyalty also erodes. This situation could lead to internal fragmentation and the strengthening of local elements at the expense of the central leadership.

In the ideological arena, the loss of the Iranian regime undermines the concept of *Velayat-e Faqih* and creates a deep identity crisis. Hezbollah stands between adapting to a more Lebanese reality, at the cost of an identity change, and radicalization and transformation into an isolated religious guerrilla movement. At the same time, the institutional dimension is also harmed: the 'state within a state' institutions would struggle to function without stable funding, and the civilian infrastructure, which previously served as a force multiplier, becomes a burden and a point of weakness.

The resulting vacuum will accelerate historical processes: the demand of parts of the Lebanese public (non-Shiite), along with the Lebanese government, the Lebanese army, and the international community, may constitute an ultimatum to implement UN Security Council Resolution 1559: complete disarmament and the integration of Hezbollah's military force into state mechanisms or its complete dissolution.

Without the umbrella of Iranian patronage over Hezbollah, the heads of the Christian, Druze, and Sunni streams in Lebanon might be bolder in practical steps designed to prevent Hezbollah from holding onto its weapons as the 'defender of Lebanon.'

The loss of the Iranian state and logistical anchor will require leadership, cohesion, and centralized decision-making ability? Will Naim Qassem, the current leader of Hezbollah, be up to it?

In such a scenario, can Naim Qassem lead a move where the organization transitions from a strategy of indirect control to an active effort to establish de facto sovereignty, with the aim of ensuring its survival? In this context, Hezbollah would exploit the depth of its grip on state institutions and the dependency mechanisms it built over the years, alongside its relative advantage within the Shiite population, to expand its influence over security mechanisms as well – and in particular over parts of the Lebanese army where there is significant Shiite representation. Such a process is liable to manifest in the gradual erosion of state loyalty, penetration of command and control centers, and the assimilation of parallel loyalties, to the point of creating a situation where the Lebanese state functions de facto under the growing influence or control of the organization.

The aforementioned scenario is, in our assessment, a low probability outcome. This is primarily due to the character, capabilities, and limited skills of Naim Qassem.

In our assessment, with high probability, Hezbollah operatives, commanders, and leaders would instead face two main choices:

1. **Handing over weapons and civil-political integration (a less likely scenario, if at all):** An attempt to assimilate as a political group into Lebanese sectarian politics, as happened to many other militias at the end of the civil war.
2. **Violent escalation to a civil war (the more likely scenario):** Hezbollah would refuse to hand over its weapons. It may ignite a prolonged and destructive civil war. The Lebanese army may disintegrate, with part of its forces fighting alongside Hezbollah and another part against it (recall that about 50 percent of the army is Shiite). The Syrian regime could exploit the opportunity and invade the Beqaa.

The likely scenario in which a violent escalation to civil war occurs would, in our assessment, win support from Hezbollah's Shiite base and also from the Shiite public of the Amal movement (or at least part of it). Historically, Hezbollah defined three main enemies: the "internal enemy" (its opponents in Lebanon), the "enemy from the south" – Israel, and the "enemy from the east" – global Sunni jihad elements from Syria (today the al-Sharaa regime).

In Hezbollah's view, in a scenario where the Iranian regime collapses, it is essentially a war for home in its eyes. The collapse of the Iranian regime magnifies the overall strength of the aforementioned enemies and amplifies their motivation to destroy Hezbollah. **We assess that in such a case, Hezbollah would view a civil war as an outcome that would lead to its survival.**