



INSIGHT PAPER

HEZBOLLAH AFTER IRAN

Lebanon's Armed State Within a State and the End of the IRGC Patronage Model

CORE HYPOTHESIS

The removal of the Islamic Revolutionary Guard Corps from power in Iran would deprive Hezbollah of the strategic sponsor that created, armed, financed and sustained it. Hezbollah's Lebanese social and political constituency would not disappear, but Hezbollah as an autonomous, heavily armed regional military actor would become structurally unsustainable and would most likely fragment, demobilise, Lebanonise or be absorbed into state institutions.

Executive Summary

Lebanon's central security problem is not simply the existence of an armed political party. It is the survival, for more than four decades, of a parallel strategic system in which Hezbollah has possessed its own armed forces, intelligence apparatus, external command relationships, financial channels and independent authority to make decisions of war and peace. That system was born from the Lebanese Civil War, Israel's 1982 invasion and the political marginalisation of many Lebanese Shiites, but it was institutionalised by the Islamic Republic of Iran. The Islamic Revolutionary Guard Corps (IRGC), and particularly the Quds Force, transformed disparate Lebanese Shiite Islamist networks into the organisation that became Hezbollah and subsequently sustained it with training, weapons, finance, doctrine and strategic direction. [1][2][3]

Hezbollah has therefore been simultaneously Lebanese and transnational. It has genuine roots in Lebanon's Shiite communities, has contested elections since 1992, operates social and welfare institutions, and has acquired a constituency that cannot simply be dismissed as foreign-directed. Yet its military scale, missile inventory, regional expeditionary capability and strategic posture toward Israel have depended on Iranian state power to an extent unmatched by any ordinary Lebanese party. U.S. Treasury assessments have historically placed direct Iranian sponsorship in the hundreds of millions of dollars annually, with older estimates around US\$700 million, supplemented by businesses, donations, smuggling and international financial networks. [4]

The organisation reached the height of its regional power during the Syrian civil war, when it operated as an expeditionary force in support of Bashar al-Assad and accumulated battlefield experience far beyond the requirements of defending Lebanese territory. That expansion also exposed a contradiction at the heart of Hezbollah's claim to be a Lebanese resistance movement: the organisation increasingly fought for an Iranian-led regional project whose priorities could diverge sharply from those of the Lebanese state.

Israel's campaigns from 2024 onward severely damaged Hezbollah's leadership, command infrastructure and weapons stocks. Hassan Nasrallah was killed in September 2024, Hashem Safieddine was killed shortly thereafter, and Naim Qassem assumed the position of secretary-general. The loss of senior leaders did not destroy the movement, but it accelerated a transition from the highly centralised Nasrallah era toward a more constrained organisation operating under greater Israeli surveillance, Lebanese political pressure and reduced strategic depth following the fall of the Assad government in Syria. [1][5]

The decisive political change inside Lebanon came with the election of former Lebanese Armed Forces commander Joseph Aoun as president in January 2025 and the appointment of Nawaf Salam as prime minister. Salam formed a 24-member government in February 2025 and secured the confidence of 95 of 128 members of parliament. The government's policy statement deliberately omitted previous language that had been interpreted as legitimising Hezbollah's separate role in national defence. [6][7]

On 2 March 2026, after Hezbollah fired missiles and drones at Israel in response to the killing of Iran's Supreme Leader during the wider U.S.-Israeli conflict with Iran, the Lebanese government declared that decisions of war and peace belonged exclusively to the state, prohibited Hezbollah's military and security activity outside state institutions and demanded that the organisation hand over its weapons. That decision represented the clearest assertion of Lebanese sovereignty over Hezbollah since the group's emergence. [8]

Lebanon nevertheless remains politically divided. Hezbollah retains significant support among Shiites, while the Amal Movement remains the other principal Shiite political force. Christian and Sunni parties are themselves fragmented and no single anti-Hezbollah bloc commands uncontested national authority. Lebanon's confessional system, economic crisis, history of civil war and continuing Israeli military pressure all limit the government's ability to impose disarmament by force. A poorly sequenced attempt to seize Hezbollah's weapons could trigger armed confrontation between Lebanese factions and recreate precisely the state weakness that enabled Hezbollah's rise in the first place.

The Lebanese Armed Forces (LAF) are consequently central to any post-Hezbollah order. The LAF has broad cross-sectarian legitimacy and is the only national institution capable of physically extending state authority, but its resources remain limited relative to the scale of the task. The United States has invested roughly US\$3 billion in

the LAF since 2006, viewing it as a stabilising counterweight to Hezbollah. Current U.S.-backed arrangements in southern Lebanon link phased Israeli withdrawal to verified Hezbollah disarmament and LAF deployment in designated areas, but implementation is slow and politically fragile. [1][9][10]

The disarmament question is not new. The 1989 Taif Agreement called for all Lebanese and non-Lebanese militias to disband and surrender their weapons to the state. United Nations Security Council Resolution 1559 of 2004 repeated the demand, while Resolution 1701 of 2006 required an area between the Blue Line and Litani River free of armed personnel and weapons other than those of the Lebanese state and UNIFIL, and reiterated that there should be no weapons or authority in Lebanon other than those of the state. [11][12][13]

The paper's central assessment is that Hezbollah can survive the death of individual leaders, the destruction of depots and even temporary cuts in funding, but it cannot indefinitely survive the disappearance of the Iranian revolutionary state that created its strategic ecosystem. The key distinction is between Hezbollah as a community-rooted political-social movement and Hezbollah as an IRGC-enabled military organisation. The former could persist in altered form; the latter would face an existential crisis.

If the IRGC were removed from power in Iran and replaced by a government that ended the external revolutionary project, Hezbollah would lose not merely money but strategic purpose, weapons replenishment, technical expertise, command connectivity, diplomatic cover, ideological authority and its role inside a wider regional deterrence network. Its residual independent revenue would sustain patronage and political activity for a time, but would be insufficient to regenerate a sophisticated missile-and-drone force under sustained Israeli interdiction and Lebanese state pressure.

The most likely end-state would therefore not be the instantaneous disappearance of every Hezbollah institution or supporter. It would be the disappearance of Hezbollah in the form that has defined Middle Eastern security since the 1980s: a heavily armed, Iranian-aligned parallel army capable of independently taking Lebanon to war. What remains could divide into a conventional political party, welfare organisations, local armed remnants and criminal-financial networks. Over time, the centre of gravity of Lebanese Shiite politics would shift from an externally armed resistance model toward competition for influence inside the Lebanese state.

That outcome is not automatic. Hezbollah could seek alternative sponsors, disperse weapons, deepen illicit financing or transform into decentralised cells. Syria, Iraqi militias or sympathetic transnational networks could provide partial assistance. None, however, can reproduce the combination of money, industrial-scale weapons supply, technical knowledge, ideological legitimacy and state-level strategic backing supplied by Tehran. The fall of the IRGC would therefore not guarantee immediate Lebanese stability, but it would remove the single most important external pillar sustaining Hezbollah's autonomous military power.

For Lebanon, the strategic opportunity would be historic: one state, one chain of command and one authority over the use of force. Realising it would require restraint as much as pressure. The objective should be political absorption and controlled disarmament rather than collective punishment of the Shiite population. A durable settlement would need to protect Shiite political representation, rebuild the south, strengthen the LAF, restore border sovereignty, reduce the incentives for Israel to retain a security zone and prevent another foreign actor from replacing Iran as sponsor.

The central hypothesis is therefore supported, with one qualification. Hezbollah will not simply evaporate the day the IRGC falls. Its constituency and institutional residues will remain. But without the IRGC and the Iranian revolutionary state, Hezbollah's defining character as an autonomous strategic military force becomes unsustainable. In that sense, the end of IRGC rule in Tehran would begin the end of Hezbollah as it has existed for more than forty years.



Figure 1. Hezbollah emblem. The organisation's visual identity explicitly reflects its revolutionary-Islamist and armed character (Source: HB).

From Civil War to Parallel State: The Origins of Hezbollah

Modern Hezbollah cannot be understood without the collapse of the Lebanese state during the 1975-1990 civil war. Lebanon's political order was built around confessional power-sharing, with senior offices allocated among religious communities. The 1943 National Pact established the convention that the president would be a Maronite Christian, the prime minister a Sunni Muslim and the speaker of parliament a Shiite Muslim. That arrangement was intended to prevent domination by any single community, but demographic change, economic inequality, Palestinian armed activity, regional intervention and weak state institutions progressively destabilised it. [1]

Lebanese Shiites entered the civil-war period with a strong sense of political and economic marginalisation. Many lived in the neglected south, the Bekaa Valley or the poorer districts of Beirut. The Amal Movement, created under the influence of Imam Musa al-Sadr, mobilised Shiite political identity before Hezbollah existed. The Islamic Revolution in Iran in 1979 then supplied a new ideological model: a revolutionary Shiite state claiming to speak not only for Iran but for oppressed Muslims across the region.

Israel's 1982 invasion created the operational conditions for the new movement. Iran deployed roughly 1,500 Revolutionary Guard personnel to Lebanon's Bekaa Valley, where they trained and organised Lebanese Shiite militants. These networks drew from clerics, former Amal cadres, Islamic Dawa activists and other groups. By 1985, Hezbollah had publicly articulated its identity through an open letter calling for the expulsion of Western influence, resistance to Israel and allegiance to the authority of Iran's Supreme Leader. [1][2][3]

The organisation's early history included attacks against U.S. and French targets in Lebanon and a sustained campaign against Israel and its local allies. Over time, Hezbollah's battlefield reputation helped it distinguish itself from rival Shiite factions. Its resistance narrative gained additional legitimacy after Israel withdrew from most of southern Lebanon in May 2000, enabling Hezbollah to present itself as the force that had succeeded where the Lebanese state and Arab armies had failed.

The Lebanese state's treatment of Hezbollah after the civil war created a lasting anomaly. The Taif Agreement called for militias to disband and surrender their weapons, yet Hezbollah was politically protected as a 'resistance' force confronting Israeli occupation. That exception hardened into a parallel security order. Other militias became parties; Hezbollah became both party and army. The consequence was not simply that Hezbollah owned weapons. It was that the state accepted, and at times formally rationalised, an organisation with a separate chain of command and a foreign strategic sponsor.

Ideology: Resistance, Revolutionary Islam and the Logic of Permanent Mobilisation

Hezbollah's ideology has evolved, but three pillars have remained durable: armed resistance to Israel, political-religious alignment with Iran's concept of velayat-e faqih (guardianship of the Islamic jurist), and opposition to Western – particularly U.S. – influence in the Middle East. Its 1985 manifesto was overtly revolutionary and framed the Lebanese struggle as part of a wider Islamic confrontation. Its 2009 political document moderated some language and recognised Lebanon's plural political system more explicitly, but did not abandon the organisation's fundamental hostility to Israel or its commitment to armed resistance. [1]

The question 'why does Hezbollah fight?' therefore has several answers. At the local level, it portrays itself as a protector of Lebanon against Israeli attack and occupation. At the communal level, it presents arms as insurance against the historical vulnerability of Lebanese Shiites. At the ideological level, it sees Israel as an illegitimate state and confrontation with it as a religious and political duty. At the regional level, Hezbollah is part of an Iranian-led 'axis of resistance' designed to impose costs on Israel and the United States without requiring Iran itself to fight every confrontation directly. [14]

These layers matter because they give Hezbollah resilience. Even if one justification weakens, another can be emphasised. After Israel withdrew in 2000, the organisation invoked the Shebaa Farms dispute, Lebanese prisoners and the continuing Israeli threat. During the Syrian civil war, it reframed intervention on Assad's side as pre-emptive defence against jihadist threats. After 2023, it linked its operations to Gaza and the broader regional confrontation. The doctrine is therefore adaptive, but the direction of adaptation consistently supports the maintenance of an armed organisation outside the state.

That creates a structural incentive for permanent insecurity. A fully normalised Lebanese-Israeli border, effective Lebanese state defence, and the absence of an Iranian regional confrontation would undermine the rationale for an autonomous 'resistance'. Hezbollah therefore has political reasons to resist any security architecture that makes its weapons unnecessary.

Leadership: From Nasrallah's Centralised Authority to a More Vulnerable Organisation

Hassan Nasrallah led Hezbollah from 1992 until his death in an Israeli air strike in September 2024. His importance went beyond the office of secretary-general. He combined religious authority, political skill, media presence and a close personal relationship with the Iranian leadership. Under Nasrallah, Hezbollah evolved from a guerrilla movement into a hybrid organisation capable of fighting conventional engagements, operating an extensive missile force, participating in Lebanese government and deploying thousands of personnel into Syria. [1][5]

Israel's 2024 campaign attacked this command architecture directly. The killing of Nasrallah, the subsequent killing of Hashem Safieddine and losses among senior military figures damaged continuity, communications and institutional memory. Naim Qassem, a founding-era cleric and long-serving deputy secretary-general, became secretary-general in October 2024. He inherited an organisation under intense operational pressure and with a narrower room for manoeuvre than Nasrallah had enjoyed. [1]

Hezbollah continues to be organised around a Shura Council and specialised political, military, executive, parliamentary and judicial structures. Yet the key issue is no longer the name of the secretary-general. It is whether the organisation can regenerate an experienced command cadre faster than Israel can identify and strike it, and whether Iran can continue to supply the resources and strategic depth required for that regeneration.

The leadership problem becomes far more serious under the paper's hypothesis. If the IRGC is removed from power in Iran, Hezbollah would lose the external institution that has historically trained leaders, mediated internal disputes, transferred specialised technology and connected the movement to the broader Iranian network. Leadership succession would become a Lebanese internal struggle rather than an Iranian-managed strategic process.



Figure 4. Hezbollah personnel and flags, illustrating the movement's continuing organised military identity.



A protester shouts slogans while holding a portrait of the late Hezbollah leader Hassan Nasrallah during a protest against the backdrop of Lebanon-Israel talks and the normalization of relations, in Beirut, Lebanon, Friday, Aug. 7, 2026. (AP Photo/Hussein Malla)

The IRGC Relationship: Patronage, Command, Finance and Strategic Depth

The relationship between Hezbollah and the IRGC is deeper than a conventional sponsor-client arrangement. The IRGC did not discover an already mature Hezbollah and begin funding it; it participated in the conditions of its creation. Iranian Revolutionary Guards helped organise, train and equip the early movement in the Bekaa Valley. Hezbollah subsequently became the most successful template for Iran's model of building allied armed groups capable of embedding themselves inside weak or divided states. [2][3][14]

Iranian support has historically included cash, weapons, military training, intelligence cooperation, communications, missile and drone technology, and assistance to construct underground facilities and local production capability. U.S. Treasury's 2026 National Terrorist Financing Risk Assessment states that Hezbollah receives hundreds of millions of dollars in direct state sponsorship from Iran, while noting historical estimates around US\$700 million. It also emphasises that Hezbollah has built supplementary revenue from international businesses, diaspora financing and illicit activity. [4]

This diversification is important but should not be misunderstood. Independent revenue can pay salaries, sustain patronage, fund social institutions and facilitate procurement. It cannot easily substitute for a state sponsor able to move missile components, provide advanced guidance technology, transfer military doctrine, supply trained specialists and use diplomatic and intelligence networks across multiple jurisdictions. Iran provides scale and strategic coherence, not simply cash.

The fall of Bashar al-Assad's government in Syria already reduced Hezbollah's strategic depth by weakening a long-standing land route between Iran and Lebanon. That makes Iranian state support more difficult to replace and increases the significance of maritime, air and illicit financial channels. The 20 August 2026 U.S. sanctions targeting a network accused of moving cash through Iran, Turkey, the UAE and Lebanon illustrate the degree to which Hezbollah now depends on complex logistics to preserve external financing under pressure. [15]

The IRGC relationship also supplies ideology and status. Hezbollah is not merely funded by Iran; it is integrated into a political project in which the Iranian Supreme Leader and the revolutionary system provide the ideological centre of gravity. If a post-IRGC Iranian government repudiated that project, Hezbollah would lose a source of authority that no Lebanese patron could replace.

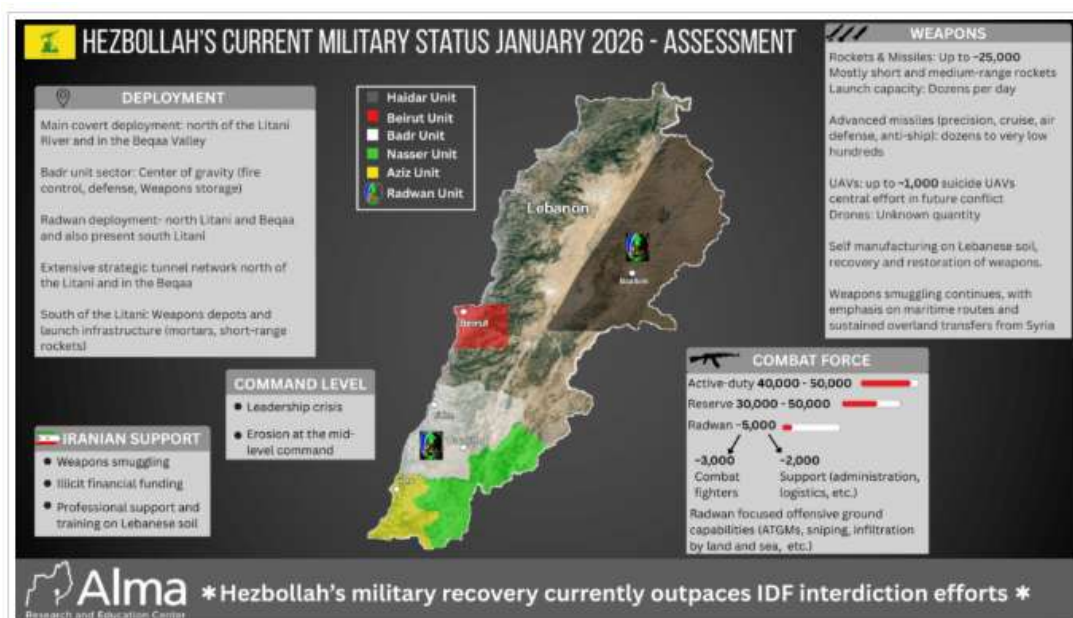


Figure 6. Open-source assessment of Hezbollah's military recovery and deployment, January 2026. Source: Alma Research and Education Center (Source: Alma)

Hezbollah as a Lebanese Political and Social Actor

Any serious assessment must avoid treating Hezbollah as a purely foreign body. The organisation is deeply embedded in Lebanese society, particularly among Shiites in the south, the Bekaa Valley and Beirut's southern suburbs. It has participated in parliamentary elections since 1992 and held cabinet posts since 2005. It also developed schools, medical facilities, charities, reconstruction organisations, youth programmes and local patronage networks. [1]

This social architecture is one reason predictions of Hezbollah's immediate disappearance are usually overstated. Political movements with community roots can outlive the foreign patrons that enabled their military expansion. The Lebanese Shiite population will continue to require political representation, economic opportunity, reconstruction and physical security even if Tehran ceases to sponsor an armed proxy.

At the same time, Hezbollah's social role has often been used to reinforce a self-contained political economy. Welfare, employment, security and ideological mobilisation have bound communities to the movement while reducing reliance on weak state institutions. The result has been a reciprocal relationship: state weakness

strengthens Hezbollah, and Hezbollah's parallel systems in turn reduce the pressure and capacity to build a stronger state.

The Amal Movement provides an important comparison. Amal is a major Shiite political force, led by parliamentary speaker Nabih Berri, and has historically competed and cooperated with Hezbollah. A post-IRGC environment could therefore produce not the disappearance of Shiite political mobilisation, but a rebalancing inside it. Hezbollah's electorate and cadres might remain politically active while the military wing loses its privileged position.

A Divided Lebanon: How the State Actually Works

Lebanon's system is designed around communal balance rather than majoritarian rule. Parliament has 128 seats divided equally between Christians and Muslims and further allocated by sect. The presidency is conventionally Maronite Christian, the premiership Sunni Muslim and the speakership Shiite Muslim. Cabinet formation is similarly shaped by confessional bargaining. This system can prevent outright communal domination, but it also encourages veto politics, patronage and prolonged institutional paralysis.

The election of Joseph Aoun on 9 January 2025 ended more than two years without a president. Aoun, previously commander of the Lebanese Armed Forces, entered office with support from a coalition that reflected the weakening of Hezbollah following the 2024 war and the collapse of the Assad regime in Syria. Nawaf Salam, formerly president of the International Court of Justice, was designated prime minister after receiving support from 84 of 128 lawmakers. His 24-member cabinet was formed on 8 February and won parliamentary confidence later that month by 95 votes. [6][7][16]

This government represents a significant but not complete break with the previous balance. Hezbollah and Amal remain represented in the political system and retain influence among Shiite voters and institutions. Parliament is fragmented among Hezbollah and Amal, the Lebanese Forces, Free Patriotic Movement, Kataeb, Sunni groupings, Druze parties, independents and reform-oriented MPs. No camp can rule Lebanon as if it were a unitary majoritarian state.

The practical significance is that Hezbollah disarmament cannot be treated as a police raid against an isolated militia. It is a national constitutional problem. The state needs enough Shiite political consent to prevent the disarmament process from being interpreted as communal dispossession. Conversely, Hezbollah can no longer plausibly claim an unlimited veto over state security policy merely because it possesses greater coercive capacity than civilian institutions.

The Lebanese Government's 2026 Break with Hezbollah's Independent War-Making

The most important political event for the future of Hezbollah occurred on 2 March 2026. Two days after the United States and Israel launched attacks on Iran, Hezbollah fired missiles and drones at Israel, describing the operation as retaliation for the killing of Iran's Supreme Leader. Lebanon had not authorised the attack. Israel responded with heavy strikes against Hezbollah-linked targets in Beirut and elsewhere. [8]

Prime Minister Nawaf Salam subsequently announced that Lebanon rejected all military or security actions from Lebanese territory outside legitimate institutions, that the decision of war and peace belonged exclusively to the state, that Hezbollah's military and security activities were prohibited outside the law, and that its weapons should be handed to the state. This was not merely rhetorical criticism. It directly challenged the constitutional logic under which Hezbollah had operated for decades. [8]

President Aoun has also pursued direct diplomatic engagement with the United States over a framework linking Hezbollah disarmament to Israeli withdrawal from southern Lebanon. During his July 2026 White House visit, Aoun presented a proposal for decommissioning Hezbollah's arsenal and argued that Lebanon required U.S. pressure on Israel to secure withdrawal and restore sovereignty. [9]

These developments show that Hezbollah's position in Lebanon is no longer protected by the same political equilibrium that existed during the Nasrallah era. The organisation still possesses coercive power and a

constituency, but the state has now publicly defined its armed autonomy as unlawful. That matters enormously if Iranian sponsorship later collapses: the legal and political framework for absorption or disarmament is already being built.

The Lebanese Armed Forces: Necessary but Not Yet Sufficient

The LAF is the indispensable institution in any transition from parallel armed authority to state monopoly over force. It is recruited across Lebanon's sectarian communities and retains wider national legitimacy than most political institutions. The United States has provided approximately US\$3 billion in support since 2006, reflecting a long-standing policy of strengthening the army as both a counterweight to non-state armed groups and a stabilising institution. [1]

However, legitimacy is not the same as coercive dominance. The LAF has been constrained by limited budgets, an economic crisis that eroded salaries, equipment shortfalls and the political risk of being ordered to fight a large domestic constituency. An attempt to defeat Hezbollah militarily could split units, produce communal mobilisation and trigger civil conflict. That is why gradual disarmament, negotiated handover and territorial sequencing are more realistic than a sudden nationwide seizure operation.

The U.S.-brokered 'pilot zone' model in southern Lebanon reflects this logic. Under the June 2026 framework, Israeli withdrawal is linked to verified Hezbollah disarmament and LAF deployment. The first implementation efforts around Zawtar al-Gharbiyeh demonstrated how slow and difficult the process is. Reuters reported that officials expected full Israeli withdrawal to take more than a year, in part because verification mechanisms remain unclear and Hezbollah has rejected disarmament while Israeli forces remain on Lebanese territory. [10]

For the LAF, the strategic requirement is therefore dual: it must become strong enough to replace Hezbollah as a provider of security without becoming the instrument of one sect against another. International assistance should focus on mobility, surveillance, counter-UAS capability, secure communications, engineering, border control, ammunition stocks and sustainable personnel support. The objective is not to build a Lebanese force capable of offensive war against Israel; it is to build a state institution capable of preventing non-state actors from independently launching one.

Israel's Strategy: Degradation, Buffer Space and Denial of Regeneration

Israel's approach to Hezbollah has moved from deterrence toward systematic degradation. The 2006 war ended with Hezbollah battered but able to rebuild. The period after 2023 convinced Israeli decision-makers that the organisation's large rocket arsenal, fortified border positions and precision-strike development constituted an unacceptable strategic threat to northern Israel. The campaign beginning in 2024 therefore concentrated on leadership decapitation, weapons infrastructure, communications, missile sites and southern deployment.

The 2026 war further expanded this approach. Hezbollah's decision to strike Israel in support of Iran triggered a renewed Israeli air and ground campaign and reinforced the Israeli argument that Lebanon could be drawn into war by decisions taken outside Beirut. The resulting destruction and displacement also increased Lebanese political opposition to Hezbollah's independent military strategy. [9]

By August 2026, Israel had linked its withdrawal from southern Lebanon directly to verified Hezbollah disarmament. Defence Minister Israel Katz stated that Israeli forces would remain in a security zone until the threat from Hezbollah across Lebanon was removed. The United States responded that a permanent Israeli presence would be inconsistent with the U.S.-brokered framework, but agreed that withdrawal and disarmament were linked. [17]

This creates a dangerous circularity. Hezbollah argues that it cannot disarm while Israel occupies Lebanese territory; Israel argues that it cannot withdraw while Hezbollah remains armed. Breaking that loop requires a credible third-party verification mechanism and an LAF presence capable of reassuring both Lebanese communities and Israel. Without such sequencing, each side's security argument becomes the justification for the other side's refusal.



An Israeli flag tops a destroyed building in southern Lebanon, as seen from northern Israel, June 28, 2026. © Ohad Zwigenberg, AP

Figure 7. Destruction in southern Lebanon, viewed from northern Israel, 28 June 2026. AP/Ohad Zwigenberg

The Legal and Political Basis for Disarmament

Hezbollah's disarmament is sometimes portrayed as a new U.S. or Israeli demand imposed on Lebanon. In fact, the principle is embedded in Lebanon's own post-civil-war settlement and in multiple United Nations resolutions. The Taif Agreement called for the disbanding of Lebanese and non-Lebanese militias and the delivery of militia weapons to the state. [11]

United Nations Security Council Resolution 1559, adopted in September 2004, called for the disbanding and disarmament of all Lebanese and non-Lebanese militias and supported the extension of government control across all Lebanese territory. [12]

Resolution 1701, adopted after the 2006 Israel-Hezbollah war, required security arrangements preventing armed personnel and weapons other than those of the Lebanese state and UNIFIL between the Blue Line and Litani River. It also reaffirmed implementation of the Taif Agreement and Resolution 1559 so that there would be no weapons or authority in Lebanon other than those of the Lebanese state. [13]

The legal problem has never been a shortage of texts. It has been the absence of sufficient domestic power and political consensus to implement them. The weakening of Hezbollah since 2024, the new government, pressure from Gulf states and Western donors, Israel's military posture and a potential future collapse of the IRGC collectively change that balance.

Current Hezbollah Activity and the Geography of the Conflict

Hezbollah's current military activity is heavily shaped by geography. Its historic core remains southern Lebanon, the Bekaa Valley and Beirut's southern suburbs. The attached ACLED mapping for March-July 2026 shows Hezbollah strike activity concentrated along the southern border and against northern Israel, with rockets, mortars and drones forming the principal attack types. It also illustrates that the conflict is not confined to a single border strip: strikes and Israeli responses create a broader security system reaching into population centres, logistics corridors and rear areas.

Israel's military activity has similarly extended beyond immediate border positions to weapons infrastructure, command nodes, personnel and suspected storage sites. The aim is increasingly to prevent Hezbollah from recreating the pre-2024 military system rather than merely respond to individual launches.

The available open-source picture suggests that Hezbollah remains dangerous but substantially less unconstrained than at its peak. Its central challenge is regeneration: replacing experienced commanders, reconstructing depots, restoring communications, moving weapons into Lebanon and maintaining political legitimacy while communities bear the physical costs of repeated war.

That regeneration contest favours Israel if external resupply is reduced. It becomes significantly more one-sided if the IRGC disappears as sponsor. Hezbollah can hide existing weapons and retain low-cost capabilities, but precision missiles, advanced drones, air defence, secure communications and large-scale logistics are difficult to sustain indefinitely without state-level assistance.

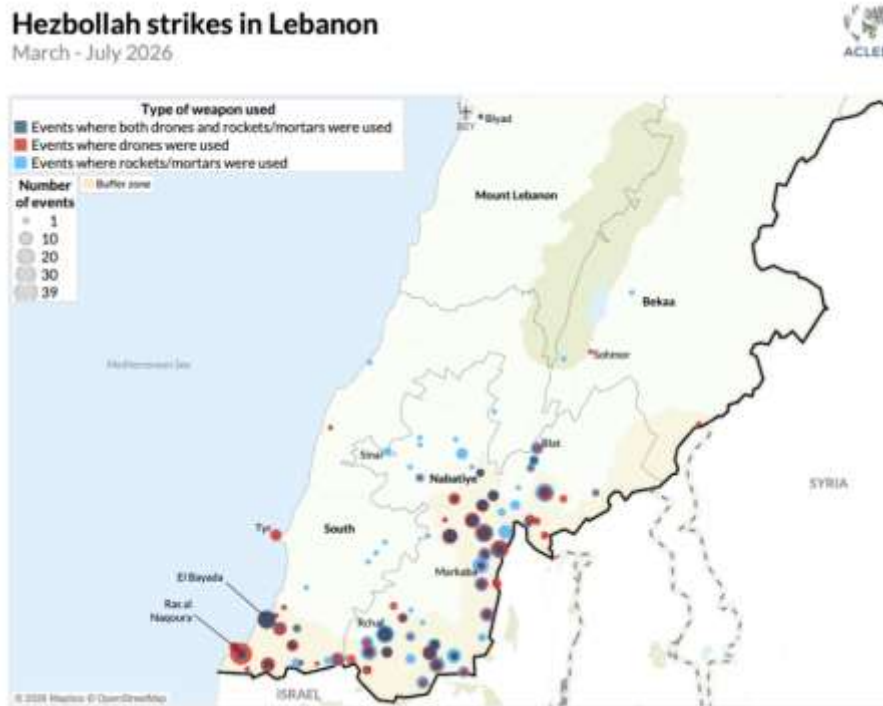


Figure 2. ACLED map of Hezbollah strike events in Lebanon, March-July 2026. (Source: ACLED)



Figure 3. ACLED map of Hezbollah strike events in Israel, March-July 2026. (Source: ACLED)

The Core Hypothesis: Why the Fall of the IRGC Would Be an Existential Shock

The strongest version of the hypothesis is not that Hezbollah exists only because Iran sends money. It is that Hezbollah's present form is the product of an ecosystem whose centre is the Iranian revolutionary state. Remove the IRGC and the ecosystem loses its organising authority:

1. Hezbollah would lose strategic finance. Even with independent revenue, the removal of hundreds of millions of dollars in direct sponsorship would force immediate choices between military regeneration, salaries, pensions, reconstruction, patronage, media and social services. Financial stress would become political stress because Hezbollah's legitimacy depends in part on its ability to provide materially for its constituency. [4]
2. It would lose advanced weapons replenishment and technical assistance. Rockets can be produced or acquired from multiple markets; precision guidance packages, specialised drone components, encrypted communications and complex missile technology are harder to replace under sanctions and Israeli intelligence penetration.
3. It would lose a command partner. The IRGC-Quds Force has historically connected Hezbollah to Iraqi militias, Syrian networks, Palestinian groups and Yemeni partners. A post-IRGC Iran that ended the axis-of-resistance strategy would sever the political framework that turns these actors into a semi-coordinated regional system.
4. Hezbollah would lose ideological validation. Its commitment to velayat-e faqih is not symbolic decoration. It links the movement to a transnational revolutionary authority. If the Iranian state itself repudiated that authority, Hezbollah would face a fundamental question: is it a Lebanese party, a Shiite religious movement, a resistance army, or the orphaned remnant of a foreign revolution?
5. The loss of Iran would alter Lebanese risk calculations. Political figures and communities that currently accommodate Hezbollah because it is backed by a powerful state would reassess. The LAF could act with greater confidence. Gulf and Western states would be more willing to finance reconstruction. Alternative Shiite leadership could emerge. Patronage networks often appear permanent until the external guarantee behind them disappears.
6. Israel's interdiction strategy would become more effective. Hezbollah could survive an Israeli campaign if Iran continually replaces money, components, advisers and political confidence. If losses become cumulative rather than renewable, every destroyed depot, tunnel, command post and senior specialist becomes strategically more important.

For these reasons, the fall of the IRGC would not be another adverse event comparable to the death of Nasrallah or the loss of a weapons shipment. It would be a systemic event.

What Would Survive: The Difference Between Hezbollah and the Hezbollah Constituency

To say that Hezbollah as a military-strategic organisation would vanish does not mean that hundreds of thousands of Lebanese suddenly abandon their identity, political preferences or community institutions. The distinction is essential to a realistic policy.

Some elements would likely survive and rebrand. Hezbollah's parliamentary bloc could continue as a legal political party. Municipal networks, charities, schools and health institutions could persist under new governance arrangements. Veterans' associations and welfare bodies could become the mechanism through which demobilisation is made politically acceptable. Some local armed cells might refuse integration and move underground.

Other elements would be vulnerable to fragmentation. Hard-line cadres could seek support from Iraqi militias or illicit networks. Criminal-financial facilitators might continue independently. A smaller clandestine organisation could retain terrorism or sabotage capability long after the main force loses its conventional arsenal.

The critical strategic threshold is therefore not zero Hezbollah-associated activity. It is the end of an autonomous army with strategic rockets, drones, fortified terrain, external expeditionary capacity and a veto over Lebanese war and peace. If those capabilities disappear, Hezbollah has ceased to exist in the form that matters most to regional security.

Alternative Sponsors and Why They Are Unlikely to Replace Iran

A strong hypothesis must address substitution. Could another actor replace Iran? In theory, elements of the former Iranian network could try. Iraqi Shiite militias have money, personnel and access to weapons. Syria could again become a corridor if political conditions changed. Private donors and organised-crime networks could sustain finance. None, however, possesses Iran's full package of state power.

Iraq's militias are themselves deeply dependent on Iranian political and logistical support and are contested inside Iraq. They may preserve relationships with Hezbollah, but are unlikely to bankroll and equip a Lebanese strategic missile force at Iranian scale. Syria is geographically important but lacks the economic and military capacity to become a substitute patron. Russia could cooperate tactically in some theatres but has little incentive to inherit Iran's costly ideological proxy architecture. Gulf states would condition major reconstruction support on disarmament, not fund a replacement militia.

The more plausible risk is not a new state sponsor but decentralisation: smaller networks financed through commercial crime, diaspora facilitators and sympathetic private actors. This could preserve a security threat but would represent a dramatic reduction from Hezbollah's current strategic role.

Disarmament: How It Could Actually Happen

A successful disarmament process should be designed around sequencing rather than surrender. Hezbollah is unlikely to accept a public ceremony of defeat. A workable model would separate weapons by category, geography and political sensitivity.

South of the Litani, the objective should be strict implementation of Resolution 1701: no armed formations, weapons depots or military infrastructure outside state control. The LAF should expand permanent presence as Israeli forces withdraw in verified stages. International monitors should verify both Lebanese disarmament and Israeli redeployment to avoid one-sided implementation.

Heavy and strategic weapons should be prioritised before individual small arms. Long-range missiles, precision-guided systems, heavy rockets, attack drones, anti-ship weapons and organised launch infrastructure are what allow Hezbollah to make independent strategic war. Removing those capabilities changes the national security balance even if some local weapons persist temporarily.

Personnel integration should be selective. Hezbollah fighters should not be absorbed en masse into the LAF as intact units, which would risk importing a parallel command structure into the state. Individuals who meet standards and accept exclusive state authority could be considered through normal recruitment or reserve structures. Others should enter civilian demobilisation programmes.

Social and reconstruction guarantees are essential. Southern Lebanon and Beirut's heavily damaged districts require housing, infrastructure and employment. If disarmament is associated with abandonment of Shiite communities, hard-liners will regain legitimacy. If it is associated with visible state delivery and international reconstruction, the political logic changes.

Amnesty should be calibrated. Rank-and-file membership or possession of weapons might be addressed through conditional amnesty, while serious crimes, terrorism and transnational illicit finance should remain subject to legal process. The purpose is to dismantle the organisation's military capability without making peaceful transition personally impossible for every member.

Most importantly, Lebanese political leaders must own the process. An Israeli-imposed disarmament would strengthen Hezbollah's resistance narrative. A Lebanese programme, backed by Arab and international guarantees and paired with Israeli withdrawal, is far more likely to endure.

Risks to the Hypothesis

The hypothesis could fail in several ways. The IRGC might be weakened in Iran without actually losing power, allowing it to continue external sponsorship through reduced but sufficient channels. A successor regime might preserve parts of the proxy network for strategic rather than ideological reasons. Hezbollah could pre-position years of funds and weapons before any transition in Tehran. A prolonged Israeli occupation could restore the organisation's resistance legitimacy. Lebanese state institutions could again collapse into paralysis or corruption.

There is also a risk of underestimating organisational adaptation. Hezbollah survived the death of leaders, military defeats, sanctions and political crises. It has developed local weapons manufacture and diverse financing precisely because it anticipated pressure on Iranian supply. The movement is not a remote-controlled unit.

These caveats do not overturn the hypothesis; they define its timeline. The loss of the IRGC would likely initiate a process rather than a single-day collapse. The military organisation could persist for months or years on residual stocks and networks. But without replenishment and strategic patronage, its trajectory would be downward unless another state assumed Iran's role.

Strategic Outlook

Three broad pathways are plausible. The first and most favourable is managed Lebanonisation: Iranian sponsorship ends, Hezbollah accepts that the armed project cannot be sustained, strategic weapons are transferred or dismantled, the political wing remains active, and the LAF assumes national security responsibilities. International reconstruction and Israeli withdrawal reinforce the transition.

The second is fragmentation. Hezbollah's political leadership accepts compromise but military cadres split, some retaining clandestine weapons and illicit finance. Lebanon improves overall sovereignty but faces a lower-level terrorism and organised-crime problem for years.

The third is violent resistance to disarmament. Hard-line commanders conclude that surrender of weapons means political extinction and confront the state. This is the most dangerous pathway because it could produce Shiite-LAF fighting, invite further Israeli intervention and fracture the national consensus. Avoiding it requires that disarmament be accompanied by credible political inclusion and security guarantees.

Under all three pathways, the status of Iran is decisive. As long as an IRGC-led system remains willing and able to sustain Hezbollah, the organisation retains an external lifeline that can reverse Lebanese pressure. If that system is removed and a successor government abandons the regional revolutionary project, time shifts decisively against Hezbollah's military wing.

Conclusion: The End of Hezbollah as a Strategic Army

Hezbollah emerged from a specific historical convergence: Lebanese state collapse, Shiite marginalisation, Israeli invasion and the rise of revolutionary Iran. Of those conditions, the Iranian factor was the one that converted local mobilisation into a durable strategic military organisation.

Four decades later, the movement remains deeply Lebanese in its social base but fundamentally dependent on the Iranian revolutionary state for its military scale and regional purpose. Its ability to survive leadership losses should not be confused with an ability to survive the disappearance of that state sponsor.

The current Lebanese government has already crossed an important political threshold by asserting exclusive state authority over war and peace and by formally challenging Hezbollah's independent military activity. The LAF is gradually becoming the instrument through which sovereignty can be restored in the south. Israel, meanwhile, is applying continuous military pressure to prevent Hezbollah's regeneration. These forces were already narrowing Hezbollah's strategic space before any hypothetical collapse of the IRGC.

If the IRGC is removed from power in Iran, the decisive external pillar disappears. Hezbollah would still possess supporters, money, weapons and organisational memory. It could remain dangerous. It could fragment. It could survive politically. But its strategic trajectory would change from regeneration to depletion.

The most likely long-term result would be the disappearance of Hezbollah as an autonomous regional army and its replacement by some combination of Lebanese political party, social movement, veterans' network and residual clandestine cells. That is the sense in which the hypothesis should be understood: not that every Hezbollah flag vanishes overnight, but that the organisation which for decades acted as Iran's forward strategic arm in the Levant ceases to be sustainable.

For Lebanon, that would be the best opportunity since the end of the civil war to complete the state-building project left unfinished by Taif: one sovereign government, one national army and one authority capable of deciding whether the country is at war.

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Analytic Note

This paper distinguishes confirmed reporting from analytic judgment. Estimates of Hezbollah manpower, weapons stocks and financing vary substantially and should be treated as indicative rather than precise. The central hypothesis concerns structural dependence: it assesses the likely consequences of the IRGC losing power and a successor Iranian government ending the revolutionary external-support model. It does not assume that every Hezbollah-associated political, social or clandestine network would disappear immediately.