

Lebanon at a Crossroad: Without Swift Disarmament, Hezbollah Will Be Victorious

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If Beirut fails to disarm the group, target its financial and political foundations, and hold it accountable for a long list of violations against the Lebanese people, a much bleaker alternative scenario will unfold.

Hezbollah is rebuilding—that's a fact. Both US and Israeli officials warned that the group had started to rebuild its military infrastructure right after the war ended in November 2024 with the ceasefire agreement. With its links to Iran intact, and its political/financial foundations protected, Hezbollah was able to rebuild some of its arsenal, reinstate part of its chain of command, and restore some of the cash it had lost.

This restoration is still not enough to constitute a threat to Israel; but it could become one if the group is not disarmed, and its financial ecosystem has not been addressed. In addition, its arms will continue to be used against other Lebanese to secure Hezbollah's position in the next parliament and government. And time is of the essence.

By the end of the war, Hezbollah had become a shadow of itself—its military infrastructure was shattered, its command framework obliterated, the Shiite community scattered as refugees across Lebanon, with little financial capability to rebuild and reconstruct. Moreover, its ally in Syria disappeared with the fall of the Assad regime, forcing its exit from that country, and losing the land bridge that connected it with Iran.

Despite the significant success that the Israeli Defense Forces (IDF) achieved in Lebanon during the war, it did not destroy Hezbollah, and its operations were not enough to eliminate all the group's tools and resources to rebuild. In addition, the ceasefire agreement failed to include a clear plan for the disarmament process, with a timeline and deliverables, leaving the LAF with the ability to lag and delay.

Therefore, more needs to be done, and in a limited time:

First, the IDF has continued to attack Hezbollah's infrastructure, and the group failed to retaliate in any way.

<https://israel-alma.org/special-report-one-year-since-the-ceasefire-in-lebanon-the-israeli-thwarting-effort-against-hezbollahs-reconstruction-effort/#:-:text=Detailed%20Analysis%20of%20IDF%20Airstrikes,out%20669%20airstrikes%20in%20Lebanon:>

to the Alma Research Center, between November 2024 and November 2025, the IDF carried out 669 airstrikes in Lebanon, and eliminated 350 Hezbollah operatives.

While Hezbollah is not responding, it is not wasting time. <https://israel-alma.org/hezbollah-independent-weapons-production-a-hybrid-doctrine-in-light-of-a-strategic-need/> to the same Center, Hezbollah is following Hamas' strategy of establishing networks of local facilities to fabricate weapons, mainly UAVs. This allows Hezbollah to import parts and material separately, without raising alarm, and produce weapons cheaply. Without pressure on Lebanon, the pace of Hezbollah's recovery might outpace efforts to disarm it.

Therefore, the US should immediately ask the Lebanese government to submit a realistic, but clear timeline for the remaining phases for disarmament—North of Litani, Dahiya, Bekaa, and the rest of Lebanon, and condition assistance on deliverables and transparency. The US should also release a formal U.S. assessment of the LAF's performance in the first phase south of Litani, which would give Lebanese officials and citizens a reference other than the Israeli assessment.

Operational control—even if it exists—is also not enough. The Lebanese government needs to be present and act as the main authority south of the Litani River. According to many of the inhabitants of southern Lebanon, Hezbollah is still the authority dictating people's everyday lives. If this doesn't change, and if the Lebanese government does not establish direct oversight, Hezbollah will be able to access the infrastructure of towns and villages and rebuild.

Second, Hezbollah will always have the capability to rebuild its weapons and military infrastructure if it continues to have strong financial and economic foundations. The group's possession of weapons is part of a larger ecosystem facilitated by their control of state institutions. Since the 2020 financial crisis, a few cash companies replaced the banking sector, which was much more regulated, and this has led to a messy network of unregulated cash flow that directly benefits Hezbollah's cash economy.

In November 2025, the US Treasury Department [sanctioned \(https://home.treasury.gov/news/press-releases/sb0308\)](https://home.treasury.gov/news/press-releases/sb0308) Hezbollah's financial operatives, stressing how Hezbollah's "exploitation of money exchange companies and the cash economy to launder illicit funds threatens the integrity of the Lebanese financial system by blending terror financing with legitimate commerce." According to the press release, the Iranian Islamic Revolutionary Guards Corps-Qods Force (IRGC-QF) has transferred over \$1 billion to Hezbollah, mostly through money exchange companies.

Hezbollah also makes and moves money via several local and regional businesses, most of which are front companies for money laundering. Without regulation of the cash economy in Lebanon, the group will regain its pre-war financial stability.

The Lebanese government is not doing—and is not being pushed to do—more. Except for a few [circulars \(https://www.naharnet.com/stories/en/316501-under-us-pressure-lebanon-tightens-screws-on-money-transfers\)](https://www.naharnet.com/stories/en/316501-under-us-pressure-lebanon-tightens-screws-on-money-transfers) by the Lebanese Central Bank about tightening restrictions, the cash economy is being ignored by the state. Not only that, but the government is indirectly financing Hezbollah. Since August 2025, the total [funding \(https://thisisbeirut.com.lb/articles/1330809/finance-committee-allocates-90m-to-amal-linked-council\)](https://thisisbeirut.com.lb/articles/1330809/finance-committee-allocates-90m-to-amal-linked-council) directed to the Council of the South by different branches of the Lebanese government has reached approximately \$132 million.

There are ways to reform the political and economic structure of the South without relying on the unregulated and

corrupt institutions of the Lebanese state. All Lebanese, including residents of the South, know that money that goes through the government council disappears into the corrupt system that is managed by the Amal movement and Hezbollah.

Therefore, Lebanon should be pressured to stop reconstruction funds to the Council of the South and regulate cash companies. One way to manage this is for the US Treasury to issue advisories, warnings, and then sanctions against cash companies that are moving and facilitating Hezbollah's flow of cash. The US should also communicate clearly to the Lebanese government that reforms should be comprehensive and directed at all state entities such as the Council of the South and Customs, to limit Hezbollah's smuggling capacities.

Third, the next parliamentary elections—scheduled for May 2026—could make a real difference in Lebanon.

Hezbollah has a plan: they have more electoral money to spend on elections than other political parties in Lebanon. Their goal—along with Amal—is to secure all twenty-seven Shia seats within the parliament and help bring in allies to other seats in order to influence the next parliament. That way, they can dictate who will be the next speaker of parliament and safeguard their place in the next government controlling the series of appointments.

One thing is clear: if Hezbollah is not disarmed before the elections, it will be able to achieve its goals. With its interests protected by the state, its weapons intact, and its money flowing, the group will probably do better than in the last parliamentary elections. Today, Hezbollah's arms are not directed at Israel; they are pointed instead at the group's opponents. Activists and Shia voters have faced Hezbollah's threats and violence (https://freedomhouse.org/country/lebanon/freedom-net/2024?utm_source=chatgpt.com) during elections in the past years, and they will probably face more aggression as the election dates approach.

Opponents, opposition figures, and voters need to be protected by the Lebanese government and its security institutions. But most importantly, violence should be punishable by law—if the Salam government is serious about reform and change, then it should start holding Hezbollah's criminals accountable. Unfortunately, that is not now the case.

Hezbollah continues to violate free speech and use violence against opponents, but there has not been a single incident in which Hezbollah was held accountable. The investigation into the Beirut port explosion (2020) is still in limbo, cases of assassinations where Hezbollah could be implicated—such as the assassination of Lokman Slim (2021)—are still unresolved, and Hezbollah's coercion tools—such as the military court—are still protected.

For example, in early February, the group's US-sanctioned "drug kingpin," Nouh Zaiter, who was leading Hezbollah's Captagon network between Lebanon and Syria, and who was arrested last November, was given a minimal sentence by the military court—the same court that Hezbollah uses to suppress free speech and dissent. Zaiter was sentenced (<https://www.newarab.com/news/drug-kingpin-nouh-zaiter-given-minimal-jail-term-lebanon>) to only four months in prison, despite being named in nearly a thousand judicial documents, including accusations of drug manufacturing and trafficking, weapons smuggling and attacks on Lebanese security forces.

Without disarmament, Hezbollah will win the elections. However, the disarmament process should be accompanied by accountability and reforms that would regulate the cash economy and Hezbollah's access to state institutions. Otherwise, Hezbollah will reemerge and revive. None of this will be achieved without US pressure, simply because if left alone, the Lebanese government is not ready to confront Hezbollah—militarily, financially, or through the judicial system.

Lebanon stands at a significant crossroad, and the next few months will determine its future. There are two options going forward:

First, going back to the pre-October 7 situation with Hezbollah rebuilding and strengthening its position within the state, securing its cash flow, killing its opponents and coercing the Shia community into submission. The Lebanese

government will continue to be broke, helpless, and unwilling to confront Hezbollah and its Iranian sponsors. In this scenario, Israel will have to do everything to protect its borders and the security of its citizens, including another round of war. But even a war won't resolve Hezbollah's threats in the long term if it is allowed the tools to rebuild.

Second, Lebanon is pushed to disarm Hezbollah, confront it without fear of a civil war that no one can afford, including the group itself, and avoid a more damaging war with Israel. In parallel, Lebanon is also directed to hold Hezbollah accountable and target its financial and political foundations, even if elections are to be postponed. With these conditions met, it would be vital to lock in a peace deal with Israel, which would not only sustain disarmament, but also secure investments and economic revival. Both the Lebanese and the Israeli people deserve some peace.

Hanin Ghaddar is the Friedmann Senior Fellow at The Washington Institute. This article was originally published on the Hoover Institution website (<https://www.hoover.org/research/lebanon-crossroad-without-swift-disarmament-hezbollah-will-be-victorious>). ❖

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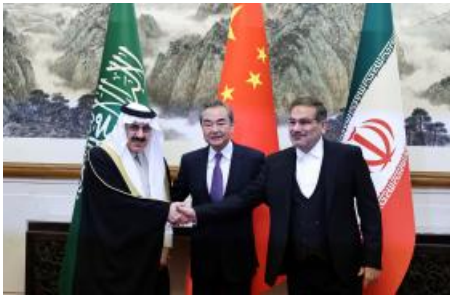
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