

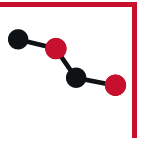
# Flash Report

## Scenarios of Potential Escalation

December 2025



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The Lebanon Crisis Analytics Team (LCAT) provides reactive and in-depth context analysis to inform the aid community in Lebanon. The information and analysis contained in this report is therefore strictly to inform humanitarian and development actors and associated policymaking on Lebanon.

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Credit: Reuters

## Introduction



Lebanon faces the possibility of an Israeli military escalation amid mounting domestic and geopolitical tensions over Hezbollah's arms, though recent US-backed diplomatic engagement between Beirut and Tel Aviv could stave off a significant escalation in the near term. This LCAT report presents three scenarios that map how escalations could unfold and analyzes their potential impacts. It aims to better inform contingency and preparedness planning by humanitarian actors and other relevant stakeholders in Lebanon. The report provides forward-looking assessments in each scenario on whether key elements of Lebanon's economy and humanitarian conditions would be likely to improve, decline, or remain stable, and evaluates the expected severity of these changes.

Since summer 2025, Washington has promoted a roadmap that calls for Lebanese authorities to disarm Hezbollah in exchange for Israel ending its military operations in Lebanon and withdrawing from five hilltops near the border with Israel.<sup>1</sup> In response, on September 5, Lebanon's cabinet approved a confidential Lebanese Armed Forces (LAF) disarmament plan, which reportedly sets out a five-stage process – without timetables – that starts south of the Litani River.<sup>2</sup> The plan reportedly does not stipulate the use of force against Hezbollah,<sup>3</sup> and builds on the November 27, 2024 Cessation of Hostilities (CoH) between Israel and Lebanon that calls for a disarmament process starting south of the Litani.<sup>4</sup> Although the CoH prohibits offensive Israeli military actions, Tel Aviv has continued its campaign of airstrikes – reportedly backed by confidential US assurances<sup>5</sup> – in a bid to dismantle Hezbollah's military capacities and compel the group to disarm.<sup>6</sup>

<sup>1</sup> Nida al-Watan, «نداء الوطن» تنشر النص الأصلي والجرفي لـ «ورقة براك» August 7, 2025

<sup>2</sup> Presidency of the Council of Ministers, 2025 مقترحات جلسة 5 أيلول 2025 September 5, 2025;

L'Orient Today, L'Orient-Le Jour reveals the main elements of the Army's plan to monopolize weapons September 5, 2025;

Al-Akhbar, ربط نزع بين الثنائي ورئيسي الجمهورية والحكومة: الجيش ينقذ الحكومة من الانفجار يطرح أفكار عامة September 6, 2025

<sup>3</sup> National News Agency, متهري: الجيش لا يريد استعمال القوة ضد أي فئة وسيقدم تقريرا شهريا عن تنفيذ الخطة. September 18, 2025;

Al-Modon, الجيش اللبناني على خطي النار الأمني... والسياسي October 9, 2025

<sup>4</sup> The National, Revealed: Full text of the Israel-Hezbollah ceasefire agreement November 27, 2024

<sup>5</sup> Axios, Israel and Lebanon agree on a ceasefire November 26, 2024

<sup>6</sup> On July 29, 2025, the Times of Israel reported that the Israeli military assessed that its military actions could potentially enable the disarmament of Hezbollah. Times of Israel, IDF assesses successes against Hezbollah since ceasefire could lead to it disarming July 28, 2025



On November 2, Israeli Defense Minister Israel Katz warned that Tel Aviv would intensify its strikes if the disarmament process were prolonged.<sup>7</sup> Leaks in Israeli,<sup>8</sup> Lebanese,<sup>9</sup> and regional<sup>10</sup> media suggest that Israel is considering a significant expansion of its military campaign in Lebanon. On November 23, Israel assassinated senior Hezbollah military official Haitham al-Tabatabai in the southern suburbs of Beirut, its first airstrike near the capital since June 5 and its most high-profile targeted killing since start of the CoH.<sup>11</sup>

Lebanon's government will face a potentially critical juncture in January, when the LAF is expected to complete the first stage of its weapons dismantlement plan south of the Litani. Without political consensus, the government is unlikely to greenlight further stages – such consensus appears doubtful since Hezbollah has only accepted disarmament south of the Litani.<sup>12</sup> The LAF's reported strategy of "containment" north of the Litani to prevent Hezbollah from transporting weapons into and within Lebanon<sup>13</sup> is unlikely to satisfy Israel, which accuses Hezbollah of continuing to smuggle and manufacture arms.<sup>14</sup> In mid-December, the US ambassador to Lebanon raised the possibility of pursuing a containment strategy if disarmament could not be achieved.<sup>15</sup>

Notably, on December 3, Lebanon appointed diplomat Simon Karam to head talks via the CoH Monitoring Mechanism with Israel following US pressure, leading to the first civilian-led talks between both states in decades. Even if initial negotiations between Beirut and Tel Aviv were to expand in frequency and scope, Israel would likely maintain its military pressure to extract concessions from Lebanon, particularly if it perceives that Hezbollah is rearming. US Ambassador to Lebanon Michel Issa stated on December 8 that "Israel does not link its military operations in Lebanon to the indirect negotiations."<sup>16</sup> However, these talks could enable Washington to dissuade Israel from launching a wide-scale offensive.<sup>17</sup>

<sup>7</sup> Israeli Foreign Minister Gidon Sa'ar via X, [@gidonsaar](#) October 30, 2025;

Israeli Defense Minister Israel Katz via X, [@Israel\\_katz](#) November 2, 2025;

Times of Israel, [Netanyahu says there are two pockets of Hamas forces behind Israeli lines in Gaza, vows to eliminate them](#) November 2, 2025

<sup>8</sup> Kan News, [שרים בקבינט: אם חמאס ימשיך להתעצם - לא יהיה מנוס ממהלך צבאי בעזה](#), November 21, 2025;

Israel Hayom, [Israeli officials say only a major operation can dismantle Hezbollah](#) November 20, 2025;

Haaretz, [A Year After the Cease-fire, Israel and Hezbollah Are on the Brink of War Again](#) November 9, 2025;

I24 reporter Inon Yttach via X, [@inon\\_yttach](#) October 26, 2025;

Walla News, [כאילו לא היו דברים מעולם: כך תיראה המלחמה העתידית בין ישראל לחיזבאללה](#), October 27, 2025

<sup>9</sup> Al-Modon, [العدوان على الضاحية: إسرائيل أسقطت المحرمات](#), November 24, 2025;

Nida al-Watan, [ساعة حاسمة لإعادة حدوده زيارة هيكل 48](#), November 21, 2025;

Al-Jadeed, [ولا «أورتاغوس تعطي لبنان مهلة» غير بعيدة أبدا](#), October 26, 2025;

Nida al-Watan, [لجنة الميكانيزم توتخ لبنان: الحرب على الأوباب](#), October 27, 2025

<sup>10</sup> Al-Arabiya, [مسؤول إسرائيلي: لا نسعى لحرب في لبنان لكن لن نتردد إذا لزم الأمر](#), November 5, 2025;

Al-Arabiya via X, [@AlArabiya\\_Brk](#) October 27, 2025;

SkyNews Arabia, [مصادر: إسرائيل تجهز لضربة موسعة على لبنان](#), October 24, 2025

<sup>11</sup> L'Orient Today, [Israel strikes Beirut's southern suburbs, Hezbollah confirms death of al-Radwan commander](#) November 23, 2025

<sup>12</sup> Al Modon, [نعيم قاسم: نلتزم بالإبقاء والإعمار.. وسنكون إلى جانب سوريا](#), December 5, 2024

<sup>13</sup> L'Orient Today, [The limits of the strategy to contain Hezbollah](#) October 28, 2025;

Lebanon Debate, [شمال الليطاني تحت عين الجيش: حواجز ثابتة لمراقبة نقل السلاح؟](#), October 9, 2025

<sup>14</sup> The Wall Street Journal, [Hezbollah Is Rearming, Putting Cease-Fire at Risk](#) October 30, 2025;

L'Orient Today, [Tom Barrack: Lebanon will risk 10,000 more lives to not have a conversation with Israel](#) November 2, 2025

<sup>15</sup> Al-Modon, [عيسى ورؤية واشنطن حيال لبنان: احتواء السلاح إذا تعذر نزع](#), December 15, 2025

<sup>16</sup> National News Agency, [السيناتور الأميركي: زار الوزير رجي: اتصالات لزيارة قائد الجيش واشنطن](#), December 8, 2025

<sup>17</sup> L'Orient Today, [Lebanon and Israel hold their first direct talks in over 40 years](#) December 3, 2025



Credit: RT

# Conflict Trends Analysis

## Military Operations post-CoH

Since the CoH came into effect, Israel has maintained its campaign aimed at dismantling Hezbollah's military capacities and compelling the group to disarm.<sup>18</sup> While the overall number of Israeli strikes has declined substantially compared to the period preceding the 66-Day War between Israel and Hezbollah (September 23–November 27, 2024), Israel continues to conduct airstrikes beyond the immediate border area at a rate comparable to the pre-war period. Hezbollah, for its part, has claimed responsibility for one largely symbolic military action against Israel on December 2, 2024.

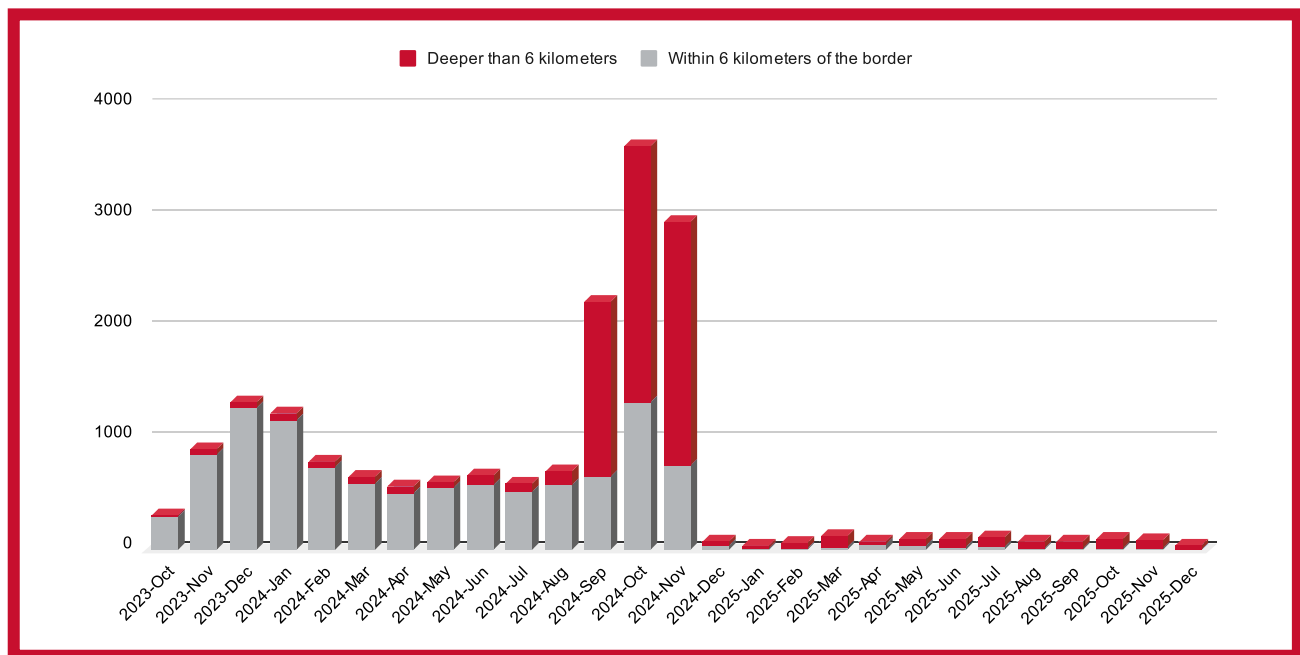
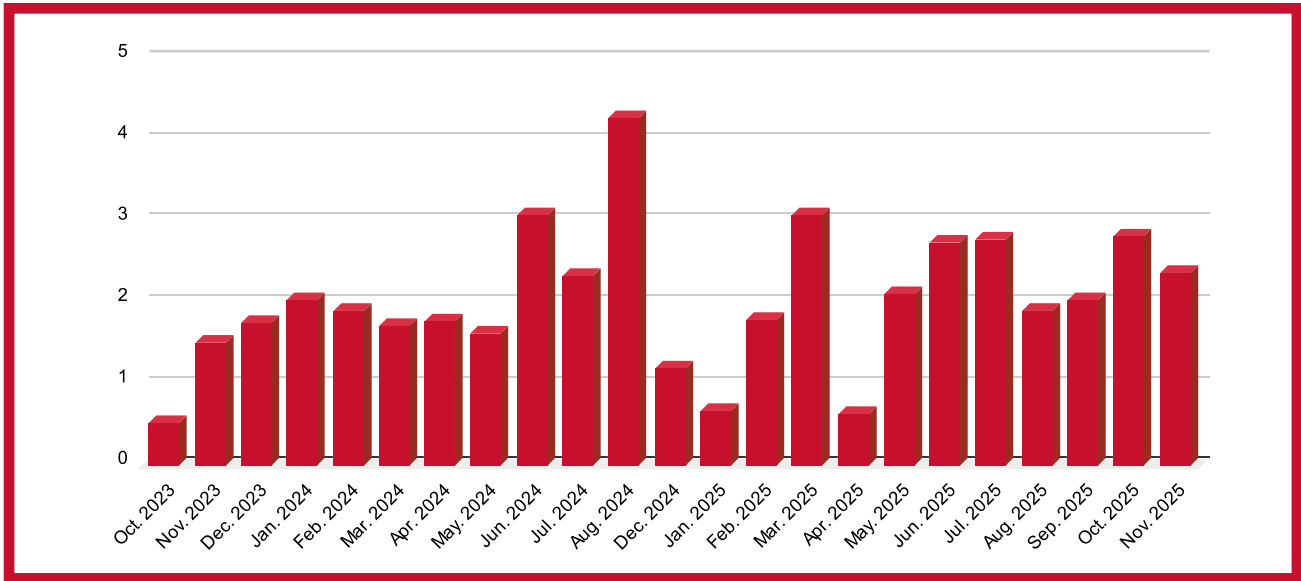


Figure 1: Israeli shelling of Lebanon by month since the start of the Israel-Hezbollah conflict (October 8, 2023).

<sup>18</sup> On July 29, 2025, the Times of Israel reported that the Israeli military assessed that its military actions could potentially enable the disarmament of Hezbollah. Times of Israel, [IDF assesses successes against Hezbollah since ceasefire could lead to it disarming](#) July 28, 2025



**Figure 2:** Israeli airstrikes and artillery fire deeper than 6 kilometers from the border with Lebanon by month (excluding the period of the 66-Day War from September to November 2024 for scale purposes).

## Hostilities continue South of Litani

Israel continues to conduct military operations along its border with Lebanon, impeding the return of the local population and delaying reconstruction efforts. These dynamics risk laying the groundwork for what several Israeli officials have described as the establishment of a buffer zone along the Lebanon-Israel border. Such statements have been met with concern by Lebanese authorities as well as international actors.

Western diplomats have also raised the prospect of replacing the United Nations Interim Force in Lebanon (UNIFIL) – whose mandate expires at the end of 2026 – with a multinational military force potentially led by the United States.<sup>19</sup> Israel has indicated it is willing to play a direct role in managing security along Lebanon’s border, while at the same time rejecting the deployment of an international force.<sup>20</sup>

Israel continues to occupy five hilltop outposts,<sup>21</sup> impeding freedom of movement near the border and the return of many displaced residents. Beginning in January, Israeli troops deployed quadcopters carrying small munitions along the border. Quadcopter attacks – along with intermittent airstrikes – regularly target prefabricated housing units, construction equipment, and agricultural land and equipment along the border region, posing a significant barrier to returns.<sup>22</sup> Quadcopter attacks climbed sharply from roughly 10 per month in early 2025 to over 50 by September.<sup>23</sup> Israeli troops also conduct intermittent demolitions of structures along the border, with some of these actions occurring over one kilometer from the demarcation line.<sup>24</sup>

<sup>19</sup> Reuters, [EU looking at options for boosting Lebanon’s internal security forces, document says](#) December 8, 2025

<sup>20</sup> Ynet News, [Israel proposes economic buffer zone along Lebanon border amid security talks](#) August 23, 2025

<sup>21</sup> BBC, [Israeli troops stay inside south Lebanon after withdrawal deadline](#) February 18, 2025

<sup>22</sup> As part of LCAT’s logging of Israeli military actions in Lebanon, LCAT notes when the actions disrupt agricultural related activity.

For example, in October, while the municipality of Blida set October 16–20 as a designated period for olive harvesting, under the supervision of the LAF and UNIFIL, Israeli troops opened fire in the vicinity of farmers on at least two occasions while quadcopters dropped stun grenades at least four times.

L’Orient Today, [Trump says allies ready to send troops to Gaza to ‘straighten out’ Hamas](#) October 21, 2025

<sup>23</sup> LCAT logs all Israeli quadcopter attacks reported by Lebanon’s National News Agency, L’Orient Today, and Al-Mayadeen. LCAT logged 33 such attacks in November 2025, 49 such attacks in October, 52 in September, 40 in August, 29 in July, 21 in June, 31 in May, 20 in April, 17 in March, 7 in February, and 10 in January.

<sup>24</sup> For example, on October 10, 2025, Israeli troops entered an area of Aita al-Chaab approximately 1 kilometer from the border and demolished a house.

L’Orient Today, [Israeli army has completed the first phase of its withdrawal, Rafah border crossing between Gaza and Egypt will reopen Tuesday](#) October 10, 2025



Israeli troops have erected a wall southeast of Yaroun along the demarcation line, rendering four square kilometers of Lebanese territory inaccessible.<sup>25</sup> Since June 2025, Israel has averaged fewer than 20 airstrikes monthly within 6-kilometers of the border, compared to 510 to 1,273 combined air and artillery strikes per month in the same area between November 2023 and September 2024.<sup>26</sup> The sharp decline in fire marks the end of tit-for-tat fighting between Israel and Hezbollah and highlights a shift in Tel Aviv's priorities. Rather than engaging Hezbollah along the border, Israel is now focused on preventing Hezbollah's return there, deploying troops near border villages, and observing Lebanese state actions to disarm Hezbollah.

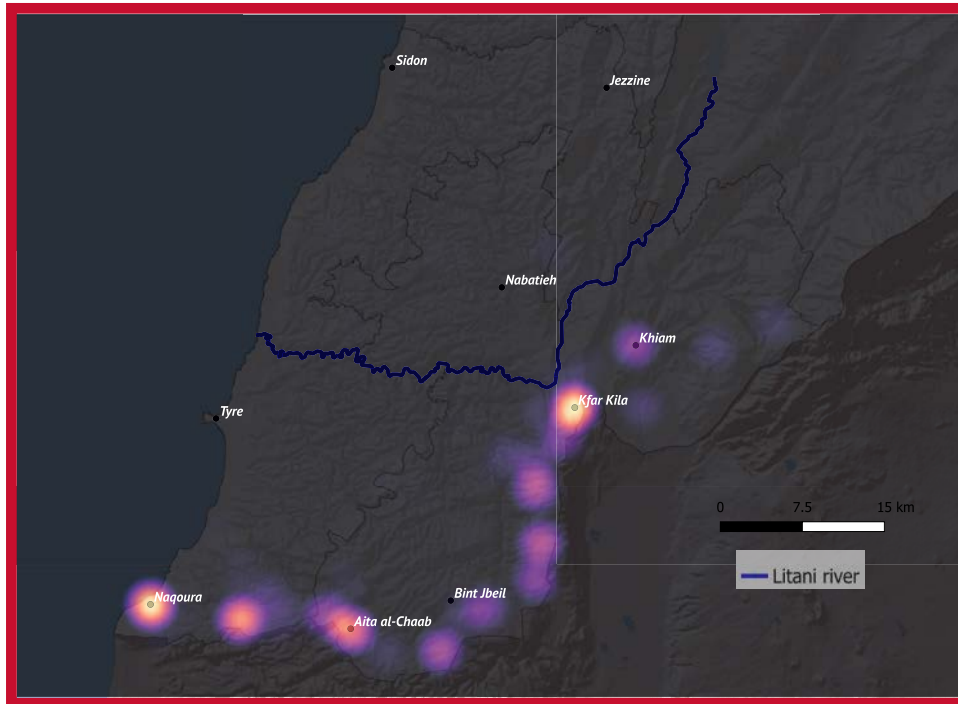


Figure 3: A heatmap of 331 Israeli quadcopter attacks since the start of the CoH on November 27, 2024 through December 15, 2025.

### Targeted operations beyond the border zone

Israel conducts regular airstrikes outside the border zone targeting Hezbollah operatives, the group's alleged military infrastructure, and its purported attempts to rebuild its arsenal.<sup>27</sup> In the year since the CoH began, Israel has averaged two airstrikes daily in areas at least six kilometers from the border,<sup>28</sup> a rate comparable to its average from the start of the conflict with Hezbollah on October 8, 2023 through September 1, 2024, when Tel Aviv began dramatically escalating its fire.<sup>29</sup>

<sup>25</sup> UNIFIL, [UNIFIL statement](#) November 14, 2025

<sup>26</sup> LCAT logs all incidents of airstrikes and artillery fire in Lebanon, noting their distance from the border. LCAT logged 852 airstrikes and rounds of artillery fire within six-kilometers of the Lebanese-Israeli border in November 2023, 1273 in December 2023, 1168 in January 2024, 742 in February 2024, 596 in March 2024, 510 in April 2024, 557 in May 2024, 576 in June 2024, 519 in July 2024, 577 in August 2024 and 665 in September 2024. LCAT has logged between 8 and 52 airstrikes within 6-kilometers of the border a month since December 2024.

<sup>27</sup> Times of Israel, [IDF says it raided several Hezbollah targets in past week, razing buildings and seizing arms](#) November 16, 2025;

Times of Israel, [IDF says it struck Hezbollah weapons depot, underground site in Lebanon](#) November 13, 2025;

Times of Israel, [IDF says it killed operative involved in restoring Hezbollah's military capabilities in south Lebanon strike](#) October 25, 2025

<sup>28</sup> LCAT logs all incidents of airstrikes and artillery fire in Lebanon, noting their distance from the border. Israel conducted 7 airstrikes deeper than 6 kilometers from the border from November 27-30, 2024, 73 in December 2024, 21 in January 2025, 50 in February 2025, 95 in March 2025, 19 in April 2025, 65 in May 2025, 82 in June 2025, 86 in July 2025, 59 in August 2025, 61 in September 2025, 87 in October 2025, 71 in November 2025 and 29 from December 1 through 15, 2025. This is an average of 1.99 airstrikes from November 27, 2024 through December 15, 2025.

<sup>29</sup> LCAT compared the rate of airstrikes outside the 6-kilometer deep border zone from the start of the CoH on November 27, 2024 through December 15, 2025 with the rate of airstrikes and artillery fire outside this border zone from October 8, 2023 through September 1, 2024, when Israel started escalating its fire. From November 27, 2024 through December 15, 2025, Israel averaged 1.99 strikes daily outside the border zone. From October 8, 2023 through September 1, 2024, Israel averaged 2.08 strikes daily outside the border zone, a similar rate of fire. When including the entire pre-war period from October 8, 2023 to September 23, 2024, when Israel started its wide-scale military campaign, it averaged 3.19 strikes a day. From September 1 to 22, 2024, Israel conducted 373 strikes, or an average of 16.95 a day.



Israel's single-largest day of bombardment since the start of the CoH came on March 22, when it conducted 37 strikes in retaliation to a rocket attack from Lebanon, for which Hezbollah denied responsibility.<sup>30</sup> Based on this precedent and its announcements,<sup>31</sup> Israel is highly likely to dramatically escalate the scope and tempo of its bombardment if Hezbollah or any other belligerents open fire on it from Lebanon.

Israel's strikes against Hezbollah's supposed arms caches and arms production facilities have focused on rural and mountainous areas outside of Nabatieh, south of Jezzine, and along the Lebanon-Syria border near Nabi Chit (see figure 5 below). Since the start of the CoH, Israel has conducted strikes against alleged Hezbollah UAV facilities in the southern suburbs of Beirut on April 27 and June 5.<sup>32</sup> Meanwhile, Israel has conducted at least 146 targeted assassinations since the start of the CoH, spread across Lebanon, including in the southern suburbs of Beirut, Baalbek, Sour, and Saïda.<sup>33</sup> On November 23, Israel conducted its most high-profile targeted assassination since the start of the CoH when it killed Haitham al-Tabatabai, a senior Hezbollah military official, in the southern suburbs of Beirut.<sup>34</sup> The vast majority of these strikes have hit vehicles, as opposed to strikes targeting residential units in the months leading up to the 66-Day War in 2024. However, targeted assassinations throughout November have increasingly targeted busy and built-up areas, leading to higher casualty tolls, including in Doueir,<sup>35</sup> Al-Tiri,<sup>36</sup> and the suburbs of Beirut.<sup>37</sup>

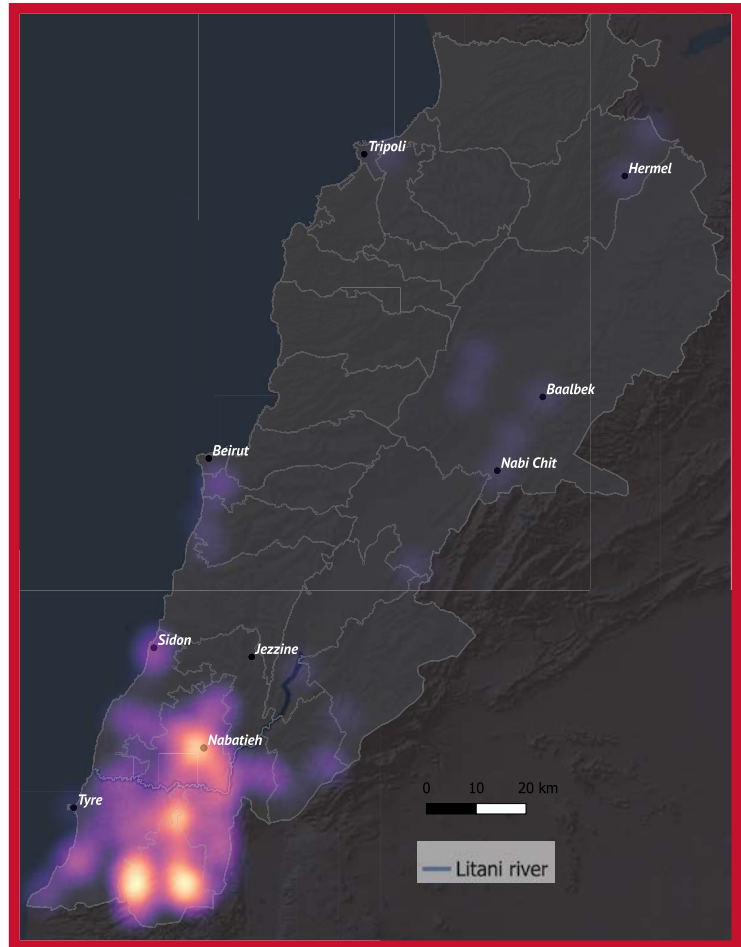


Figure 4: A heatmap of 146 Israeli targeted assassinations in Lebanon from November 27, 2024 through December 15, 2025.

## Israel targeting reconstruction efforts

Israel has increasingly targeted reconstruction-related equipment and infrastructure, including two waves of strikes in October that destroyed hundreds of construction vehicles,<sup>38</sup> asphalt and cement production facilities, and fuel depots, the largest set of such strikes since the start of the CoH.<sup>39</sup>

<sup>30</sup> Reuters, [Truce shaky as Israel strikes Lebanon in response to rocket fire](#) March 22, 2025

<sup>31</sup> L'Orient Today, [Netanyahu says Israel will strike 'anywhere in Lebanon'; Katz threatens Beirut for every attack on Israel's north](#) March 28, 2025

<sup>32</sup> L'Orient Today, [Aoun calls on France, US to 'force Israel to immediately end its attacks' following bombing in Hadath](#) April 27, 2025;

AFP, [Israel hits south Beirut after targeting 'underground Hezbollah drone sites'](#) June 5, 2025

<sup>33</sup> LCAT logs Israeli military statements regarding its targeted assassinations. LCAT defines a targeted assassination as an Israeli strike aimed at a specific individual(s) and does not count Israel's statements of strikes against alleged Hezbollah infrastructure that kill members of Hezbollah. Israel's statements before February 2025 were ambiguous on whether it was conducting targeted assassinations, so LCAT does not log any numbers from this period.

<sup>34</sup> L'Orient Today, [Israel strikes Beirut's southern suburbs, Hezbollah confirms death of al-Radwan commander](#) November 23, 2025

<sup>35</sup> National News Agency, [العدوان على الدوير يستهدف منطقة مكتظة: استشهد مواطن وإصابة 7 بحروح وأضرار مادية كبيرة](#) November 3, 2025

<sup>36</sup> National News Agency, [إستهداف سيارة في الطبري وإصابة طلاب في حافلة مدرسة خلفها \(\\*\)](#) November 19, 2025

<sup>37</sup> L'Orient Today, [Israel strikes Beirut's southern suburbs, Hezbollah confirms death of al-Radwan commander](#) November 23, 2025

<sup>38</sup> National News Agency, [عدوان المصبلح أدى إلى تدمير أكثر من 300 البنة بين حرافات وحفارات](#) October 11, 2025

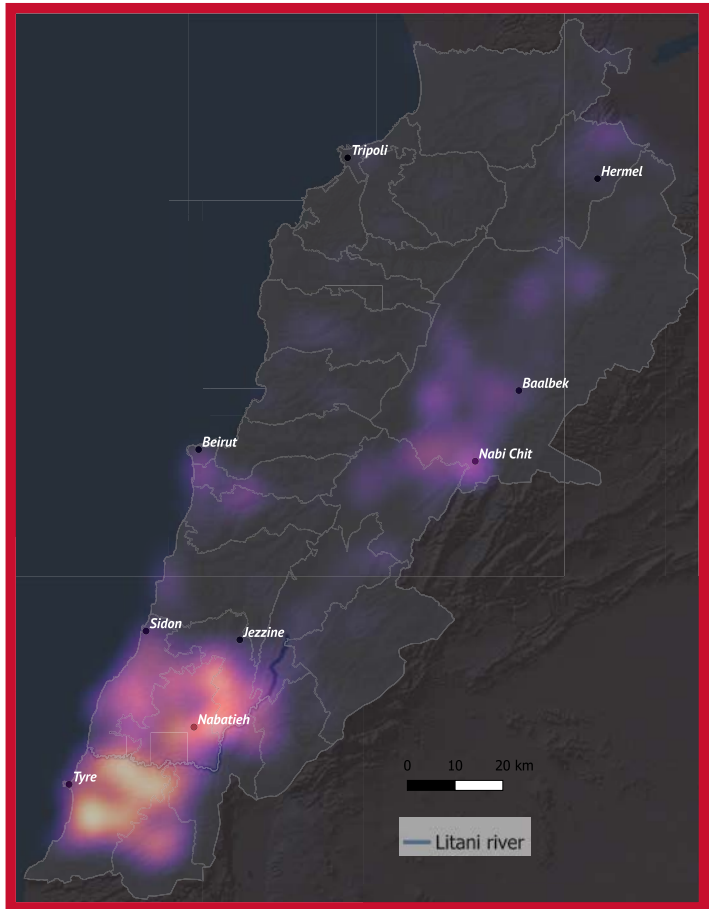
<sup>39</sup> National News Agency, [الوكالة الوطنية: عابنت مخلفات العدوان الاسرائيلي على وادي بصفور سيني - أنصار: دمار هائل في منشآت "صناعية والخسائر بالملايين ومئات العائلات من دون عمل](#) October 17, 2025



Prior to these attacks, Israel had conducted intermittent airstrikes and quadcopter attacks targeting construction equipment, such as bulldozers and excavators, on at least 39 occasions, including a September 3 attack in Ansariyeh that destroyed dozens of heavy vehicles.<sup>40</sup> Israel's targeted assassination campaign against Hezbollah has also shifted to encompass individuals responsible for constructing, repairing, or maintaining infrastructure, with the Israeli military announcing in mid-October that it was targeting Hezbollah-affiliated engineers, contractors, and businessmen.<sup>41</sup>

In one instance, on October 2, an Israeli unmanned aerial vehicle (UAV) strike outside Kfar Roummane killed two engineers working for Meamar Construction,<sup>42</sup> a firm sanctioned by the US for allegedly being controlled by Hezbollah.<sup>43</sup> Tel Aviv has also issued advanced striking warnings since start of the CoH, including in southern Lebanese towns on September 18<sup>44</sup> and November 6,<sup>45</sup> prompting residents to temporarily flee their homes.

In the year since the start of the CoH, Israeli strikes have killed an average of approximately one person a day, nearly half the death toll in the months leading up to the 66-Day War.<sup>46</sup> During the 66-Day War, Israeli strikes killed at least 47 people a day<sup>47</sup> and forced seven hospitals to suspend operations.<sup>48</sup> Israeli strikes in the past year have not caused any casualties among first responders or damage to front-line clinics, as they regularly did in the months leading up to the 66-Day War.



**Figure 5:** A heatmap of 674 Israeli airstrikes six kilometers or deeper from the border that targeted alleged Hezbollah infrastructure and military activities since November 27, 2024.

<sup>40</sup> National News Agency, [شهير في الغارة على أنصارية وعدلون والطيران الحربي المعادي استهدف أيضا ساحة طبرجرفا](#) September 3, 2025;

L'Orient Today, [Fragile calm returns to South Lebanon following eight strikes in Saïda region](#) September 4, 2025

<sup>41</sup> Israeli military spokesperson Avichay Adraee via X, [@AvichayAdraee](#) October 16, 2025

<sup>42</sup> National News Agency, [شهيدا غارة الجرمق مهندسان من كفرمان](#) October 2, 2025

<sup>43</sup> US Department of the Treasury, [Treasury Targets Hizballah Executive Council Companies and Official](#) September 17, 2025

<sup>44</sup> National News Agency, [حركة نزوح من كفرتنبيت باتجاه النبطية](#) September 18, 2025

<sup>45</sup> Al-Hadath via Facebook, [قناة الحدث](#) November 6, 2025

<sup>46</sup> Israeli strikes have killed 363 people from November 27, 2024 through December 15, 2025, for an average of 0.94 a day. Between October 8, 2023 and September 15, 2024, Israeli military actions killed 610 people, for an average of 1.78 per day.

LCAT logs all reports by the Lebanese Ministry of Public Health, National News Agency, L'Orient Today, and Al-Mayadeen of casualties caused by Israeli military actions. When reports differ between sources, LCAT uses figures reported by the Ministry of Public Health.

<sup>47</sup> Israeli attacks killed 4,047 people in Lebanon since October 8, 2023, or 3,437 from September 16, 2024 through the CoH on November 27, 2024, according to Ministry of Public Health statistics.

Reuters, [Israeli attacks have killed 4,047 people in Lebanon, Lebanese minister says](#) December 4, 2024;

National News Agency, [الأبيض فضل التسهيلات الطبية المقدمة للنازحين وتأمين التواصل على 1214 و1787](#) September 28, 2024

<sup>48</sup> LCAT has logged all reports of hospital closures and damage since the start of the Israel-Hezbollah conflict on October 8, 2023.



Credit: AFP

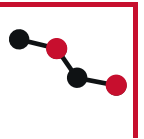
# Scenarios

LCAT formulated the following three scenarios to serve as models for analyzing the ongoing Israel-Hezbollah conflict and potential escalation. For each scenario, LCAT presents specific escalatory pathways to illustrate how the conflict between Israel and Hezbollah could unfold. The scenarios below are also evaluated for their humanitarian impacts. LCAT does not aim to predict specific events, but rather present plausible pathways of escalation that can aid humanitarian organizations and other decision-makers when preparing for contingencies. The scenarios below and their escalatory trajectories should not be viewed as mutually exclusive.

LCAT analyzes the impacts of the scenarios using a directional scale assessment and rates the impacts of individual escalatory trajectories (for example widescale Israeli bombardment of infrastructure) on displacement, public infrastructure, the economy, the health sector and casualties, humanitarian access, social and political stability, as well as food security. For each of these categories, LCAT assesses whether it foresees catastrophic, sharp, or limited deterioration, or instead expects conditions to remain stable or improve.

Severity	Catastrophic Deterioration	Sharp Deterioration	Limited Deterioration	Stable or mixed
Color Code	<span style="border: 2px solid red; display: inline-block; width: 20px; height: 10px;"></span>	<span style="border: 2px solid orange; display: inline-block; width: 20px; height: 10px;"></span>	<span style="border: 2px solid yellow; display: inline-block; width: 20px; height: 10px;"></span>	<span style="border: 2px solid green; display: inline-block; width: 20px; height: 10px;"></span>

**Analytical Key:** LCAT's classification system for its directional scale assessment.



# I. Deteriorating Status-Quo

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**Status:** Unfolding at the time of publication

**Short-term likelihood (one to three months):** Likely

**Medium-term likelihood (three to six months):** Plausible

**Potential deterrents to escalation:**

- The US imposes restrictions on Israel’s military campaign to bolster the Lebanese cabinet’s efforts regarding the nationwide disarmament of Hezbollah
- Lebanon and Israel engage in a diplomatic process that forestalls Israeli escalations, building on recent, limited diplomatic engagement between Israeli and Lebanese civilian negotiators
- The Israeli political and military leadership perceive that the status-quo coupled with US pressure can eventually achieve its security objectives in Lebanon, including Hezbollah’s disarmament

**Key Dynamics:**

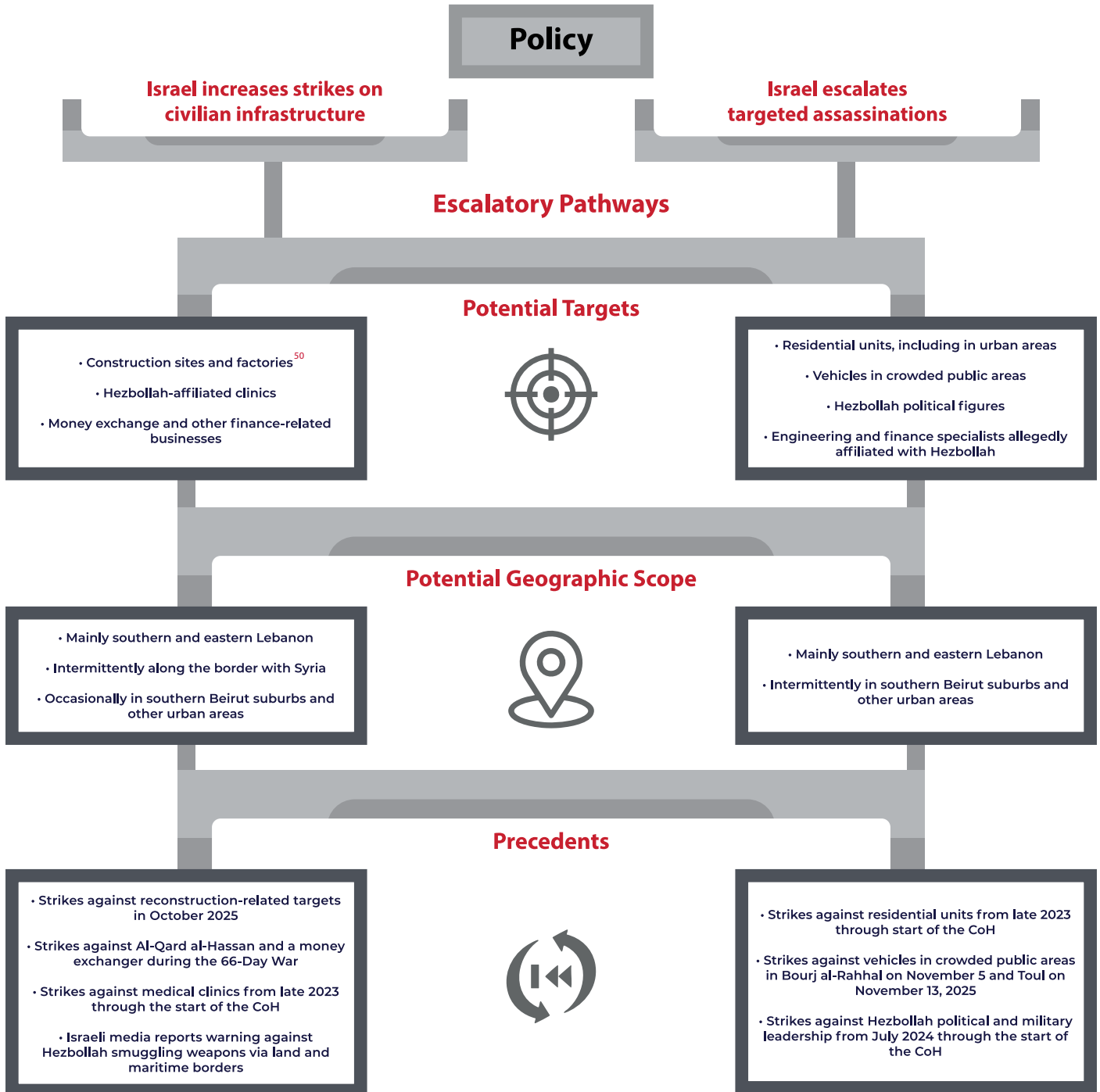
- Israel increases the tempo of its airstrikes across Lebanon targeting Hezbollah operatives and the group’s alleged military infrastructure, while largely avoiding conducting strikes in urban areas. Israel conducts approximately 100 to 150 airstrikes a month, reflecting the pace of strikes in August 2024, a month prior to its military escalations against Hezbollah and the start of the 66-Day War<sup>49</sup>
- Israel’s military actions do not significantly expand beyond the border zone and do not significantly increase casualty tolls – compared to the current monthly average – across the country
- Hezbollah does not retaliate following Israeli military actions and does not engage in domestic political actions that could lead to civil strife
- The US continues to engage Lebanon’s government on disarming Hezbollah and enacting financial reforms

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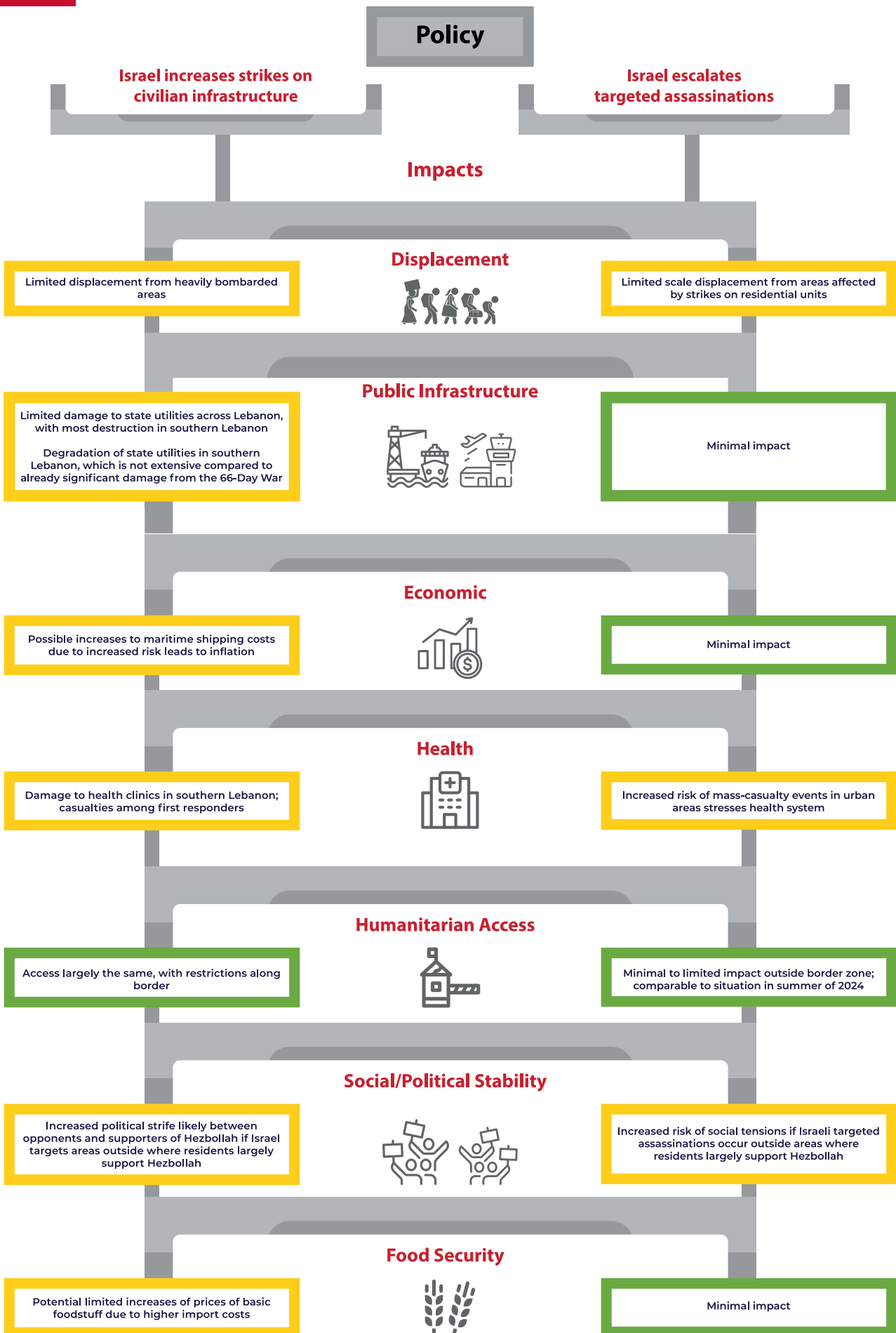
<sup>49</sup> LCAT logged at least 132 Israeli airstrikes and rounds of artillery deeper than 6 kilometers into Lebanon in August 2024.



## Escalatory Pathways and Impacts: Scenario 1: Deteriorating Status Quo

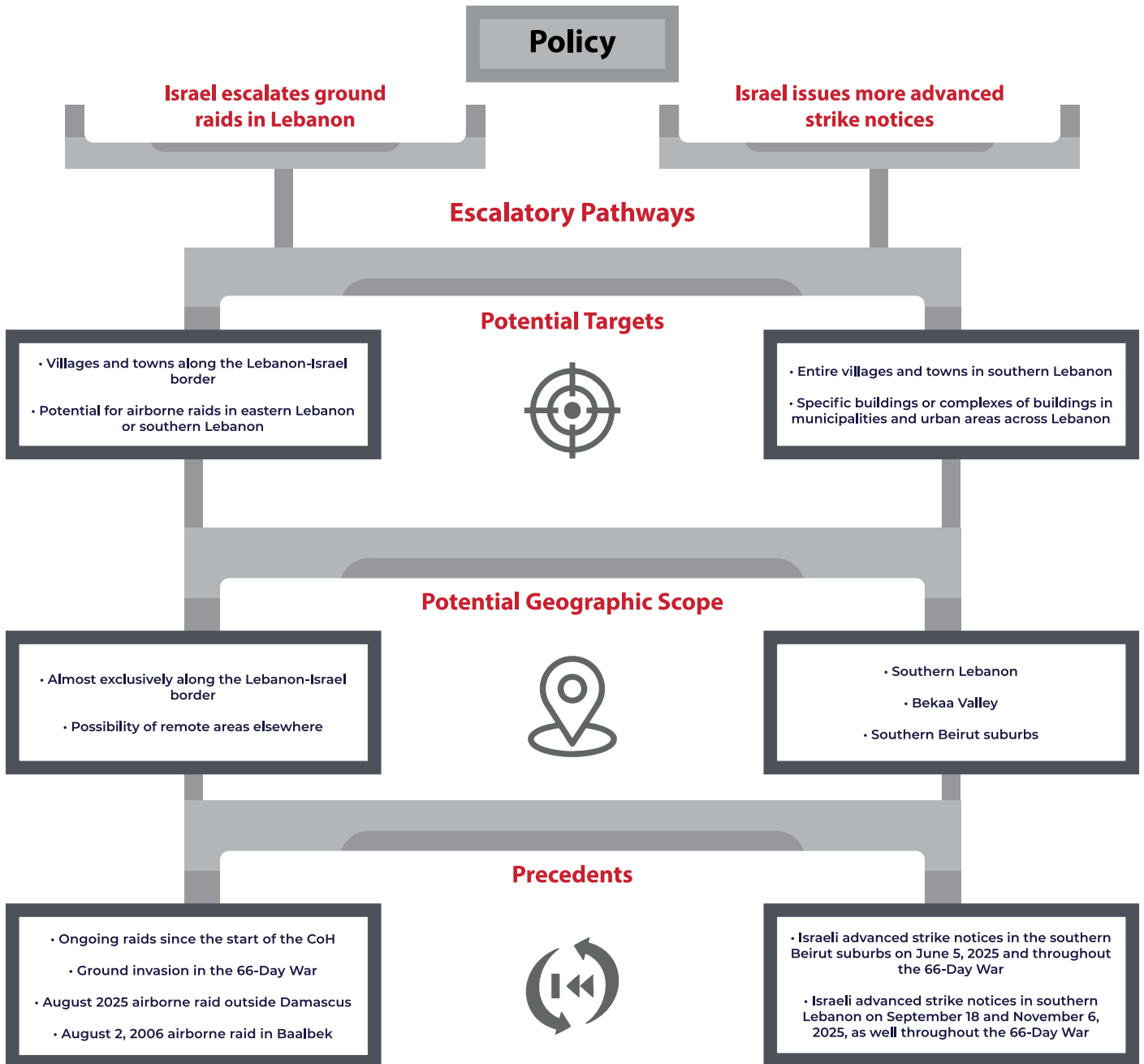


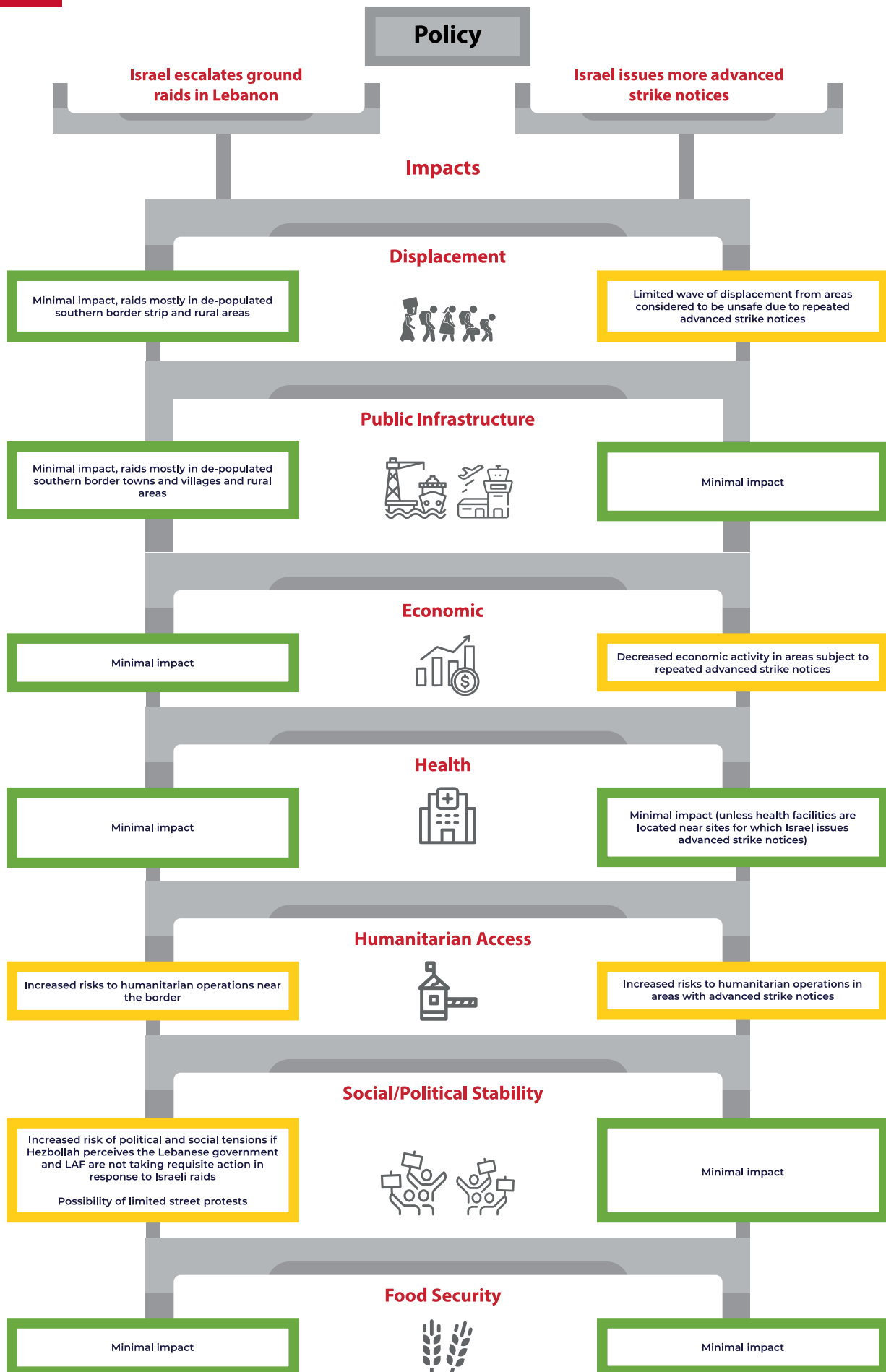
<sup>50</sup> The New Arab, [Israel pounds south Lebanon to block reconstruction efforts](#) October 17, 2025





## Escalatory Pathways and Impacts: Scenario 1: Deteriorating Status Quo







## II. Significant Israeli escalation

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**Status:** Not yet occurred

**Short-term likelihood (one to three months):** Plausible

**Medium-term likelihood (three to six months):** Likely

**Potential trigger points:**

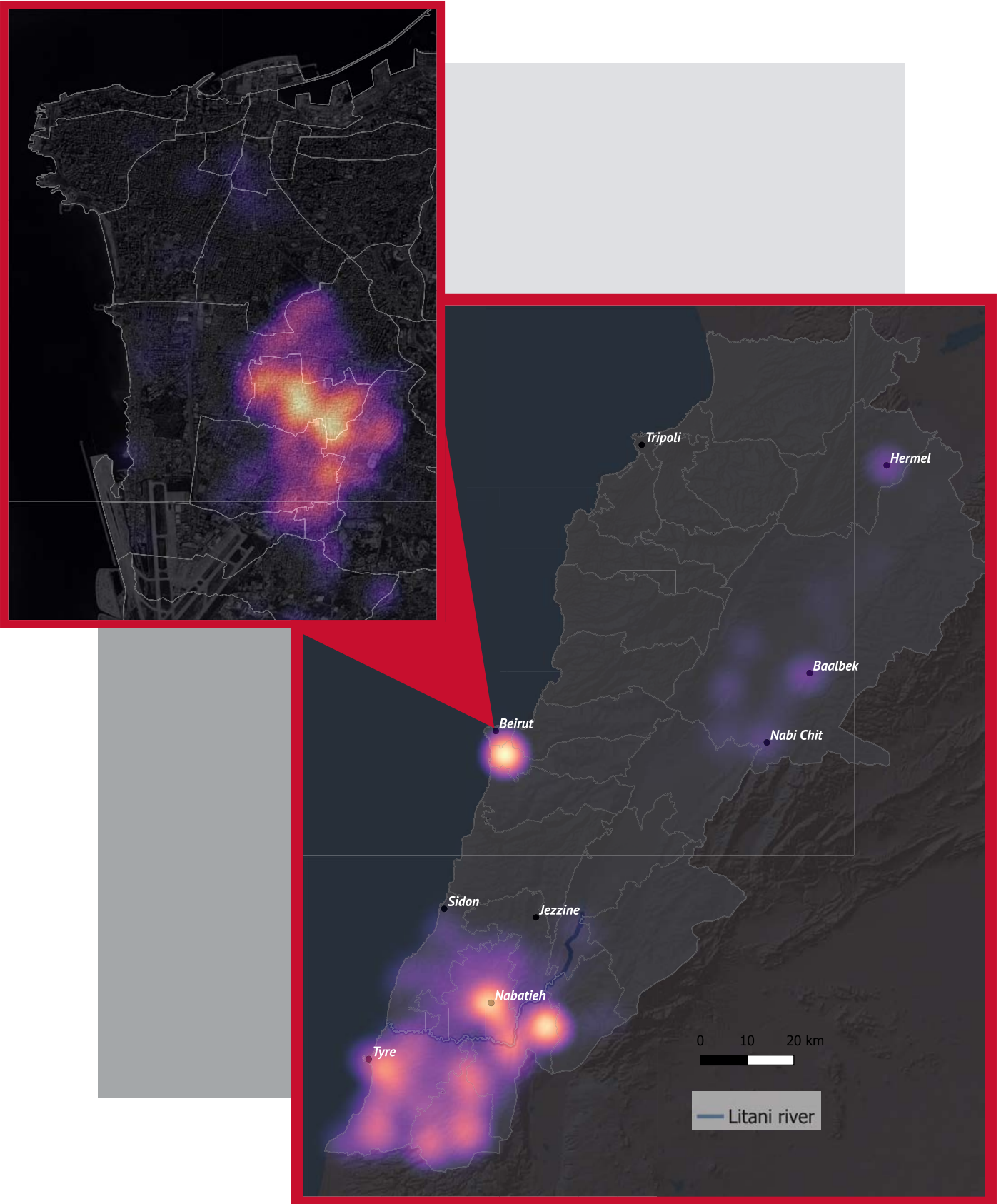
- The Lebanese government and LAF are unable and/or unwilling to proceed with disarmament of Hezbollah north of the Litani River
- Lebanon and Israel are unable to agree on a mechanism for diplomatic talks on border demarcation and other security issues, which coupled with the above trigger point, leads to US disengagement
- Israeli policymakers perceive that Hezbollah is reconstituting its military capacities in a manner that poses a security threat to Israel
- Lack of progress on the US-backed negotiation track
- Unsuccessful GCC-led efforts with Iran to support stabilization efforts in Lebanon and Syria, and the disarmament of Hezbollah

**Key Dynamics:**

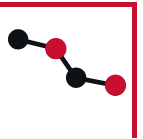
- Israel conducts an intensified air campaign that targets Hezbollah's political and military leadership as well as its military infrastructure. This campaign could reach or even surpass the intensity of Israel's bombardment during the 66-Day War, when it averaged 120 strikes a day<sup>51</sup> (see Figure 6 below)
- Israeli military establishes a buffer zone in southern Lebanon through ground incursions or major troop deployments northward to the Litani River or along the southeastern Lebanon border with Israel and Syria
- The duration of Israel's escalation could range from a few days to a lengthy confrontation like the 2006 War or 66-Day War
- Hezbollah retaliates against Israeli strikes, raising the potential of further escalation
- The US halts its current political engagement with the Lebanese government, instead focusing on coercive measures

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<sup>51</sup> LCAT logged 7,980 Israeli airstrikes from September 22, 2024 through the beginning of the CoH on November 27, 2024.



**Figure 6:** Heatmaps of Israel's nearly 8,000 airstrikes in Lebanon and 337 in the greater Beirut area during the 66-Day War, offering a reference for where Tel Aviv could concentrate its fire in a renewed military escalation.



## Escalatory Pathways and Impacts: Scenario 2: Significant Israeli escalation

### Policy

Israel launches widescale strikes targeting public infrastructure

Israel stages intense ground campaign

Israel conducts intense bombing campaign against Hezbollah figures and alleged weapon caches

### Escalatory Pathways

#### Potential Targets

- Maritime ports and the Beirut Airport
- Telecommunication towers
- Private fuel stations and public fuel storage facilities
- LAF infrastructure, including communications
- Bridges, overpasses, and major roads



- Towns and villages between the border and the Litani River
- Rural areas in the Bekaa valley and southeastern Lebanon border with Syria



- Construction and engineering-related infrastructure in southern and eastern Lebanon
- Residential and commercial buildings in the southern suburbs of Beirut, Bekaa valley, and southern Lebanon

#### Potential Geographic Scope

- Entirety of Lebanon



- Southern Lebanon and potentially parts of eastern Lebanon near the border with Syria



- Southern Lebanon
- Southern Beirut suburbs
- Eastern Lebanon

#### Precedents

- 2006 War

- Israeli warning it holds the Lebanese state responsible for Hezbollah and its disarmament



- 2006 War
- 66-Day War

- Media leaks suggesting that Israel could expand its military presence up to the Litani River



- 66-Day War
- 2006 War

- Strikes against civilian infrastructure in southern Lebanon in October 2025



**Policy**

**Israel launches widescale strikes targeting public infrastructure**

**Israel stages intense ground campaign**

**Israel conducts intense bombing campaign against Hezbollah figures and alleged weapon caches**

**Impacts**

**Displacement**

Potentially hundreds of thousands displaced due to fear of broader conflict and widespread strikes



Potentially hundreds of thousands displaced by ground combat and airstrikes



Potentially hundreds of thousands displaced due to fear of broader conflict and widespread strikes

**Public Infrastructure**

Possibility of widespread destruction, including to key communications and transportation infrastructure, severely disrupting logistics across the country



Likelihood of destruction of public infrastructure in areas with ground fighting or Israeli military advances



Widespread strikes against alleged Hezbollah infrastructure such as roadways, bridges, overpasses; the campaign of strikes either damages or disrupts access to fuel facilities and healthcare facilities

**Economic**

Destruction of key infrastructure leads to economic knock-on effects, for example damage to fuel facilities causes shortages of diesel and gasoline that in turn leads to decreased vehicular transportation and electricity access from back-up power generators



Slowdown of economic activity nationwide; severe impacts to economic activity in southern and southeastern Lebanon; significant impacts to agriculture and tourism sectors



Slowdown of economic activity nationwide; severe impacts to economic activity in southern and eastern Lebanon; severe impacts to agriculture and tourism sectors

**Health**

Damage and destruction to health clinics in southern Lebanon like in 66-Day War; possibility of hospital services being negatively impacted by knock-on effects from infrastructure damage nationwide



Damage and destruction to health clinics in southern Lebanon similar to the 66-Day War



Sharp rise in casualties similar to the 66-Day War; stress on the healthcare sector and emergency response, which demonstrated during the 66-Day War that they were prepared for conflict and did not collapse

**Humanitarian Access**

Humanitarian access limited due to risk of bombardment in southern and eastern Lebanon as well as southern suburbs of Beirut; damage to state infrastructure such as transportation and communication networks disrupts humanitarian operations



Humanitarian access not possible in areas with ongoing fighting; Israel controls access to areas in which its troops are operating



Humanitarian access limited due to risk of bombardment in southern and eastern Lebanon as well as southern suburbs of Beirut

**Social/Political Stability**

Political opponents of Hezbollah and their supporters push for more stringent state action against the organization amid strikes on state infrastructure, fueling political tensions



Increased risk of social tensions between host communities and internally displaced people (IDP)



Increased risk of social tensions due to displacement; Israeli targeted assassinations in destination areas for IDPs increases fear among host communities and drives tensions with IDPs

**Food Security**

Disruption of transportation networks in Lebanon affects food availability; fears of broader sustained conflict leads to hoarding of essential foodstuffs and increases in prices



Food security significantly impacted in areas of ground fighting, far more limited impact nationwide



Widespread strikes stoke fears of sustained conflict and lead to hoarding of essential foodstuff and increases in prices



## III. International isolation of Lebanon

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**Status:** Not yet occurred

**Short-term likelihood (one to three months):** Plausible

**Medium-term likelihood (three to six months):** Plausible

**Potential trigger points:**

- The Lebanese government and LAF are unable and/or unwilling to proceed with disarmament of Hezbollah north of the Litani River and a strategy of “containing” these arms does not satisfy the US and other foreign powers
- Diplomatic talks between Lebanon and Israel break down due to Israel’s unwillingness to make concessions amid perceived insufficient efforts to disarm Hezbollah and/or internal resistance in Lebanon to direct political talks
- Lebanon does not progress on financial sector reforms, prompting the US and other foreign powers to lose trust in the country’s policymakers, including on the issues of illicit finance and fundraising for Hezbollah

**Key Dynamics:**

- The US suspends its current political engagement with the Lebanese government, instead focusing on coercive measures
- Political parties opposed to Hezbollah in Lebanon, backed by foreign supporters such as the US and Saudi Arabia, push for Lebanese state action against Hezbollah, including disarmament of the organization north of the Litani
- Intercommunal tensions spike in Lebanon. Amid a new wave of internal displacement due to Israeli military escalation, host communities grow suspicious of IDPs following Israeli targeted assassinations of alleged Hezbollah figures among the displaced



## Escalatory Pathways and Impacts: Scenario 3: Lebanon isolation

### Policy

US suspends aid for LAF

Syrian security action against Hezbollah in border region

Israeli blockade

### Escalatory Pathways

#### Potential Targets

- Lebanese Armed Forces
- Other Lebanese security forces



- Alleged Hezbollah facilities and members
- Lebanese clansmen accused of affiliation with Hezbollah



- Lebanese trade facilities; including seaports and the airport

#### Potential Geographic Scope

- Entirety of Lebanon



- Lebanon-Syria borders; with a likely focus on northeastern Lebanon stretching from Hermel through Arsal



- Lebanon's coast and airspace

#### Precedents

- US funding freezes for USAID programs starting in 2025
- US frustration with perceived LAF inaction regarding Hezbollah's disarmament
- Statements from US politicians expressing dissatisfaction with LAF



- Recent warning from US envoy that Syria could take action against Hezbollah
- Syrian security sweeps against alleged Hezbollah members earlier in 2025 that led to two rounds of fighting along the border



- Israel's maritime and aerial blockade during the 2006 War
- Israel's blockades on trade and aid for Gaza



**Policy**

**US suspends aid for LAF**

**Syrian security action against Hezbollah in border region**

**Israeli blockade**

**Impacts**

**Displacement**

Minimal direct impact



Limited displacement of residents of northeastern Lebanon and other border regions due to fighting



Minimal direct impact

**Public Infrastructure**

Minimal direct impact



Limited damage to public infrastructure; which is sparse in peripheral areas of Lebanon near the border with Syria



Fuel shortages degrade capacities of Lebanese public institutions, including water, electricity, and telecommunication utilities

**Economic**

US funding freeze ends salary support for approximately 80,000 LAF soldiers and officers; drastically affecting the spending power of these households



Minimal direct impact



Import-dependent Lebanon suffers a severe decline in economic activity and significant shortages of goods

**Health**

Minimal direct impact



Minimal direct impact



A blockade, even if not comprehensive, severely disrupts medicine and medical supply imports, harming hospital operations while leading to shortages of key pharmaceuticals

**Humanitarian Access**

Diminished capacities of LAF has limited impact on security for humanitarian programs across Lebanon



Limited restrictions on humanitarian organizations' access to border regions due to Syrian security operations and potential fighting



Humanitarian organizations face severe restrictions bringing in key supplies needed for sustaining their operations

**Social/Political Stability**

Diminished capacities of LAF reduces ability of state authorities to quell protests and stop civil strife. Sharp political tensions between opponents of Hezbollah and the organization



Increasing intercommunal tensions between Lebanese host communities and Syrian refugees, especially between Hezbollah-supporting host communities in eastern Lebanon and large Syrian refugee and migrant worker communities



Political and social tensions rise amid shortages of goods and sharply degrading economic conditions, potential uptick in street protests

**Food Security**

Minimal direct impact



Minimal direct impact



An embargo decreases availability of basic foodstuff, leading to increasing prices and lack of access for disadvantaged groups, including IDPs



# Conclusion

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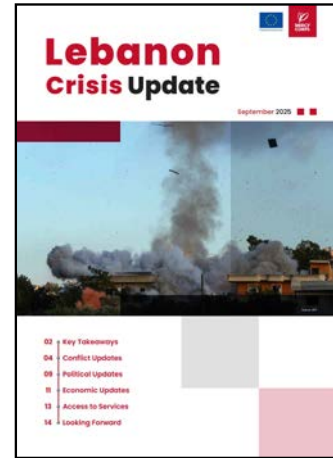
Humanitarian organizations and other stakeholders should not assume that future escalations in the Israel-Hezbollah conflict will replicate past patterns. The 66-Day War, hostilities in southern Lebanon and the Bekaa since October 8, 2023, and the 2006 War were each shaped by distinct circumstances. Certain hazards – such as internal displacement or pressure on the health system – would almost certainly recur in any future escalation. Other risks would likely be unexpected or would not reflect recent conflict dynamics. For example, Israel’s widescale strikes during the 66-Day War left most of Lebanon’s state infrastructure intact, though Tel Aviv may expand its targeting in a future conflict.

LCAT’s analysis of plausible scenarios and escalation pathways identifies an acute risk to public and civilian infrastructure that could disrupt transportation networks, communications, electricity provision, and the supply of essential goods. Assuming wider targeting, a renewed conflict would inflict deeper economic damage than the 66-Day War. An Israeli embargo and/or US sanctions could severely constrain imports of critical goods – including food and medical supplies – as well as limit international financial transactions and slow the inflow of remittances, a key lifeline for households in Lebanon. Aid and development actors also depend on consistent access to the international financial system. Restricted or no access would require potentially significant shifts in planning and implementation to account for severely constrained cash inflows, likely at a time when needs would be greatest. Long-term, expanded hostilities under the most severe scenarios could result in limited access to essential commodities and a marked jump in unemployment, possibly in conjunction with a breakdown of already limited state services – potential drivers of intercommunal tensions.

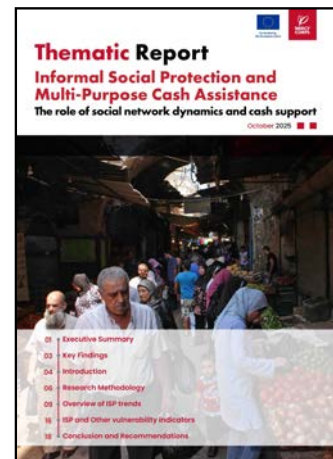
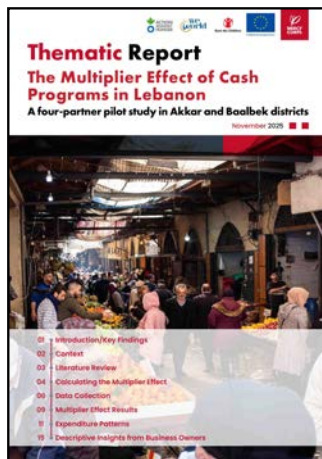
While domestic tensions have intensified, they have not escalated into widespread intercommunal violence. However, Israeli military escalation could fuel internal divisions and even trigger sporadic sectarian violence. Large-scale internal displacement and the imposition of economic sanctions, affecting the whole population, would likely further exacerbate communal tensions. The LAF, weakened by years of underfunding and strong external and internal political pressures, would risk being further undermined by deepening political and sectarian polarization.



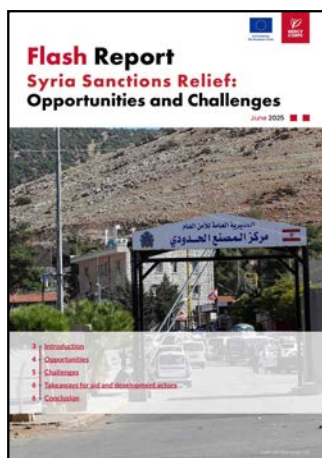
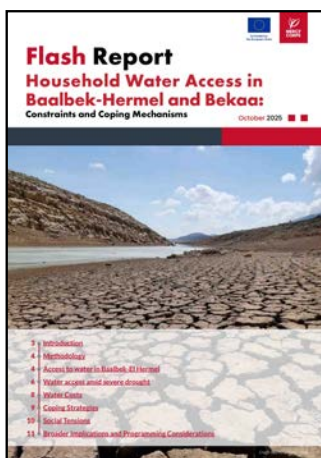
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