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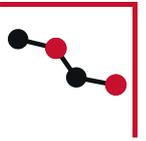
# Flash Report

## Potential Strike on Iran: Pathways for Lebanon

January 2026



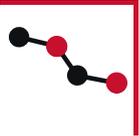
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The Lebanon Crisis Analytics Team (LCAT) provides reactive and in-depth context analysis to inform the aid community in Lebanon. The information and analysis contained in this report is therefore strictly to inform humanitarian and development actors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

*This study/report is made possible by the support of the European Union Humanitarian Aid. The contents of this report are the sole responsibility of the LCAT and do not necessarily reflect the views of the European Union.*





Credit: AP

## Introduction

Tensions have risen between the United States (US) and Iran, with Washington signaling that it could conduct military action in response to Tehran's deadly crackdown on domestic protests. This Lebanese Crisis Analytics Team (LCAT) report presents three scenarios that map how escalations could unfold between the US and Iran, with a focus on the potential impact on Lebanon. The goal is to inform contingency and preparedness planning by humanitarian actors and other relevant stakeholders in Lebanon. This analysis complements LCAT's December 19 [report](#) that analyzed scenarios for possible Israeli military escalation in Lebanon.<sup>1</sup>

LCAT's analysis considers three scenarios:

1. Ongoing tensions between Tehran amid a US military buildup;
2. Limited, one-off US strikes on Iran;
3. Major military action against Iranian political, military, and security personnel and infrastructure

As events continue to unfold rapidly, LCAT is unable to assign likelihoods to any of these scenarios. Moreover, this analysis does not include a scenario in which the US takes no substantive action toward Iran, which would amount to a return to the status quo. LCAT also factors potential Israeli involvement within each scenario. Finally, LCAT's analysis does not assess medium- to long-term outcomes of the scenarios; rather, it focuses on short-term dynamics.

<sup>1</sup> Disclaimer: all references to disarmament are analytical and not prescriptive. LCAT does not imply endorsement or support to any political or military course of action.



Credit: AP

## Context

On December 28, in response to the crash in value of the Iranian rial and deteriorating living conditions, demonstrations began in Tehran.<sup>2</sup> These grew into nationwide political protests challenging Iran's ruling authorities, who oversaw a deadly response by security forces and shut down the country's internet access starting on January 8.<sup>3</sup> As of January 22, at least 5,848 people – including 209 members of the security forces – had reportedly been killed in the protests.<sup>4</sup> US President Donald Trump has repeatedly indicated that he would take action against Iran, including in a January 13 media post in which he urged protesters to take over state institutions, stating “help is on its way.”<sup>5</sup> According to media reports, the US postponed a potential military operation at the urging of its Gulf allies and Israel, who expressed concerns about possible Iranian retaliation.<sup>6</sup> On January 16, Trump said he had decided independently to delay a strike, citing Iran's alleged decision not to carry out executions of detainees, which could signal that Washington was seeking to avoid further escalation.<sup>7</sup> The situation remains highly volatile, with the US reportedly deploying additional military assets to the Middle East, including an aircraft carrier.<sup>8</sup> On January 17, Trump said “It's time to look for new leadership in Iran.”<sup>9</sup> Beginning on January 19, reports emerged that protests in Iran had subsided.<sup>10</sup>

<sup>2</sup> UN Security Council, [Briefing on Protests in Iran](#) January 15, 2026

<sup>3</sup> Reuters, [New Trump warning as Iran cuts internet with protests across country](#) January 10, 2026;

France24, [Iran protests: The biggest challenge to the Islamic Republic since its founding](#) January 15, 2026;

Associated Press, [As protests rage, Iran pulls the plug on contact with the world](#) January 10, 2026

<sup>4</sup> As of January 26, 2026, a US-based rights group monitoring events in Iran reported that at least 5,848 have been killed in the protests, while another 17,091 potential deaths were being investigated. An Iranian Health Ministry official told the New York Times on January 13, 2026 that approximately 3,000 people had died.

AFP, [US deploys aircraft carrier as Iran warns against attack](#) January 26, 2026;

The New York Times, [‘Shoot to Kill’: Accounts of Brutal Crackdown Emerge From Iran](#) January 13, 2026

<sup>5</sup> U.S. President Donald Trump via Truth Socials, [@realDonaldTrump](#) January 13, 2026

<sup>6</sup> CNN, [On the verge of strikes in Iran, the US held off. What happens next is up to Trump](#) January 15, 2026;

The New York Times, [Israel and Arab Nations Ask Trump to Refrain From Attacking Iran](#) January 15, 2026;

Axios, [Iran strikes delayed as Trump aides and Israel raise concerns](#) January 15, 2026

<sup>7</sup> Axios, [Scoop: Trump and Netanyahu discussed Iran in second phone call](#) January 16, 2026

<sup>8</sup> Forbes, [U.S. Navy Supercarrier USS Abraham Lincoln Heading To The Middle East](#) January 15, 2026;

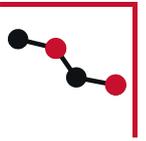
Fox News, [US sending military assets to Middle East as Trump weighs Iran strike, sources say](#) January 15, 2026

<sup>9</sup> Politico, [Trump to POLITICO: ‘It's time to look for new leadership in Iran’](#) January 17, 2026;

CNN, [US carrier strike group is now in the Middle East region, sources say](#) January 26, 2026

<sup>10</sup> ABC News, [Bloody crackdown appears to have quelled Iran protests for now](#) January 19, 2026;

AFP, [Iran protest crackdown latest developments](#) January 20, 2026



Meanwhile in Lebanon, there is mounting international pressure for the state to confiscate Hezbollah's arsenal. On January 8, the Lebanese Armed Forces (LAF) announced it had completed the first phase of disarmament south of the Litani River,<sup>11</sup> though prospects for doing so nationwide are uncertain. Lebanon's government tasked the LAF with drawing up a plan by early February for confiscating Hezbollah's arms between the Litani and Awali rivers.<sup>12</sup> The government – which includes ministers affiliated with Hezbollah and its ally the Amal Movement – must first approve the plan. While Hezbollah has implicitly accepted its disarmament south of the Litani River, it has rejected disarmament north of the Litani, calling for a full Israeli withdrawal from the occupied hilltops and a halt to all Israeli military action in Lebanon.<sup>13</sup> Even if the cabinet were to greenlight a second stage of disarmament, it may not be immediately implemented, given concerns that attempts by the LAF to disarm the group by force could trigger internal violence. Israel, for its part, has repeatedly warned that it might escalate its military actions targeting Hezbollah if it perceives the group is reconstituting its military capabilities amid slow Lebanese state disarmament efforts. The US, for its part, has been investing diplomatic efforts into the disarmament process and attempting to broker negotiations between Israel and Lebanon, which might avert any threatened Israeli escalation.

<sup>11</sup> Lebanese Armed Forces, [تحقيق أهداف المرحلة الأولى من خطة الجيش لحصص السلاح](#), January 8, 2026

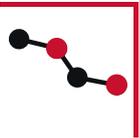
<sup>12</sup> Presidency of the Council of Ministers, [جلسة مجلس الوزراء في قصر بعبدا أقرت معظم بنود جدول الأعمال](#), January 8, 2026

<sup>13</sup> National News Agency, [قاسم: لينفذ العدو الاتفاق ويوقف خروقاته بعدها تناقش استراتيجية الأمن الوطني لما فيه مصلحة البلد وقوته](#), December 28, 2025

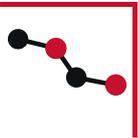


# Scenario Matrix

Scenario matrix: US-Iran tensions			
US policy pathways	<p><b>1) Medium-term military build-up;</b></p> <p><b>Push Iran to make significant concessions on nuclear and missile programs, regional proxies;</b></p> <p><b>possible deadline issued</b></p>	<p><b>2) Limited, one-off strike on Iran</b></p>	<p><b>3) Major military action against Iranian political, military and/or security personnel and/or infrastructure</b></p>
Iranian response	<p>Mobilization of forces to deter US, including deployment of naval and missile assets that could threaten commercial maritime traffic and energy infrastructure, US military units, and Israel</p> <p>Possible talks with US, including on status of proxies such as Hezbollah</p>	<p>Symbolic retaliation, similar to the June 23, 2025 missile attack on US Al-Udeid airbase in Doha, Qatar, when Iran gave advanced notice of its strike.</p> <p><b>A miscalibrated US strike and/or Iranian retaliation could prompt escalated military exchanges, which shift events toward Scenario 3: major military action</b></p>	<p>If Iranian leadership perceives US military strikes do not threaten their hold on power, military response will be calibrated to avoid stronger US or Israeli response</p> <p>If Iranian leadership perceives that US military action threatens their hold on power, a significant military response is likely, including strikes on US military bases and Israel as well as possibility of attacks on Gulf energy infrastructure</p>
Israeli action	<p>No unilateral strike on Iran;</p> <p>Preservation of military resources for possible outbreak of conflict;</p> <p>Likely not to escalate significantly against Hezbollah until resolution of Iran-US crisis;</p> <p>Increased risks of Israeli escalation in Lebanon if Israel perceives it has enough of a window prior to a possible Iran-US conflict</p>	<p>None, if Iran undertakes symbolic retaliation to US military interests.</p> <p>If struck by Iran, Israel will retaliate, in which case see Scenario 3.</p>	<p>Significant retaliation for any Iranian missile strikes; possible offensive involvement in US strikes</p>



Scenario matrix: US-Iran tensions			
<b>Hezbollah involvement</b>	Status-quo; Refraining from military actions against Israel	Unlikely, unless this scenario escalates, <b>in which case see Scenario 3.</b>	<p>Possible involvement in conflict if Iran directs Hezbollah to strike Israel;</p> <p>Risks increase if Iranian Supreme Leader Ayatollah Ali Khamenei is killed or Iranian leadership's hold on power is seriously threatened;</p> <p>Risks increase if Israel is involved in the conflict;</p> <p>Possible internal splits between pragmatists and hawks over policy</p>
<b>Impact on Hezbollah disarmament</b>	<p>Possibility of stalling process; as Lebanese political parties, including Hezbollah, await resolution of crisis;</p> <p>Hezbollah is unlikely to cooperate with the LAF on disarmament north of Litani amid US-Iran crisis</p>	No direct impact, unless this scenario escalates, <b>in which case see Scenario 3.</b>	<p>Possibility of stalling process; as Lebanese political parties, including Hezbollah, await resolution of conflict;</p> <p>Hezbollah is unlikely to cooperate with the LAF on disarmament north of Litani amid US-Iran conflict;</p> <p>Disarmament process unable to move forward if conflict ignites between Hezbollah and Israel</p>
<b>Impact on Lebanon security</b>	Deteriorating status quo (see LCAT's Scenarios of Potential Escalation report)	No direct impact, unless this scenario escalates, <b>in which case see Scenario 3.</b>	Widescale Israeli escalation if conflict ignites with Hezbollah (see LCAT's Scenarios of Potential Escalation report)
<b>Impact on Lebanon economy</b>	Possibility of increased fuel prices, leading to limited increases in transportation and heating costs	No direct impact, unless this scenario escalates, <b>in which case see Scenario 3.</b>	<p>Possibility of energy market chaos;</p> <p>Possibility of fuel price hikes , worsening standards of living, including affordability of heating, electricity, and cooking gas. Fuel price hikes could stress essential state services such as telecoms and water distribution;</p> <p>Flight disruptions at Beirut Airport;</p> <p>Possibility of widespread economic destruction in event of Hezbollah-Israel conflict (see LCAT's Scenarios of Potential Escalation report)</p>



Credit: AP

# Scenarios

## 1. US Military Buildup Amid Continued Tensions with Iran

### **Context:**

Under this scenario, the US deploys significant military force to its bases across the Middle East, echoing its posture in the spring of 2025, when it sought to pressure Tehran into reaching an agreement over its nuclear program.<sup>14</sup> This time, Washington would aim to secure more comprehensive concessions from Iran across a range of key issues. US Special Envoy to the Middle East Steve Witkoff on January 17 said that a diplomatic agreement with Iran would address nuclear enrichment, Tehran's ballistic missile program, Iran's uranium stocks, and its regional proxies.<sup>15</sup> The US might set a deadline for Iran to reach an agreement, similar to the 60-day ultimatum it issued ahead of its June 22 strikes on Iranian nuclear sites.<sup>16</sup>

### **Impacts on Lebanon**

- If Israel assesses that the US is preparing for a near-term strike on Iran, it is likely to avoid significantly escalating its campaign against Hezbollah in Lebanon, prioritizing military readiness for a possible conflict with Iran.
  - If Israel does not launch a widescale campaign in Lebanon, the security status quo in Lebanon is likely to deteriorate gradually. Humanitarian actors should expect Israel to increase strikes between the Litani and Awali rivers and in the Bekaa, with the potential of targeted assassinations in urban areas, including the southern Beirut suburbs. (See LCAT's report [Scenarios of Potential Escalation](#))

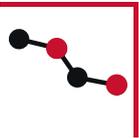
<sup>14</sup> Politico, [US builds up military presence in Middle East](#) June 16, 2025;

CNN, [US moves B-2 stealth bombers to Indian Ocean island in massive show of force to Houthis, Iran](#) April 2, 2025

<sup>15</sup> Times of Israel, [Witkoff indicates US prefers to resolve Iran tensions with diplomacy, not military action](#) January 17, 2026

<sup>16</sup> CNN, [How Trump quietly made the historic decision to launch strikes in Iran](#) June 22, 2025;

Reuters, ['We knew everything,' Trump tells Reuters about Israel's strikes on Iran](#) June 13, 2025



- Israeli media reported in early January that Israel has postponed plans for a potential widescale campaign in Lebanon until the situation in Iran becomes clear.<sup>17</sup>
- From January 1 to 25, 2026, Israel conducted 118 airstrikes in Lebanon, its highest rate of fire since the start of the Cessation of Hostilities (CoH) on November 27, 2024.<sup>18</sup>

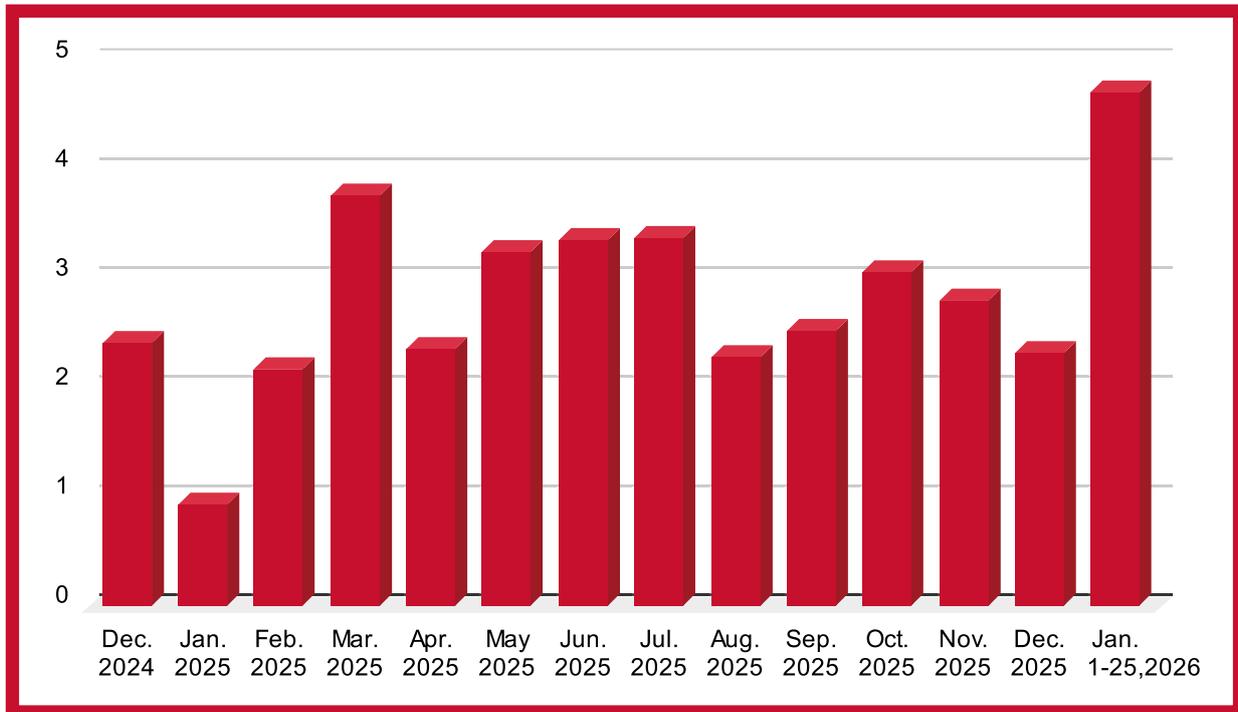


Figure 1: Average daily rate of airstrikes in Lebanon per month since the CoH came into effect on November 27, 2024.

- **If the US issues a medium-term deadline to Iran and opens a diplomatic track, risks of an Israeli military escalation in Lebanon would increase.**
  - Israel might pursue such a campaign if it assesses that it could inflict significant damage on Hezbollah, reduce the risk of a second front in any conflict with Tehran, and conclude the operation prior to a potential US strike on Iran.
  - Before doing so, however, Israel would likely seek US approval, which Washington might withhold if it believes the Lebanese state can credibly disarm Hezbollah north of the Litani or that diplomacy with Iran could resolve the arms issue.
  - Newly launched US-mediated talks between Israeli and Lebanese civilian representatives offer a potential pathway for defusing tensions,<sup>19</sup> but they have gotten off to a faltering start. It is unclear when these talks, held through the CoH monitoring committee, will reconvene, with press reports indicating they might be on an indefinite hiatus.<sup>20</sup>

<sup>17</sup> Yedioth Ahronoth, [הדין הרגיש שכינס נתניהו, וההכנות לפעול בכל הזירות | המוקדים - ושאלת העיתון](#) January 7, 2026;

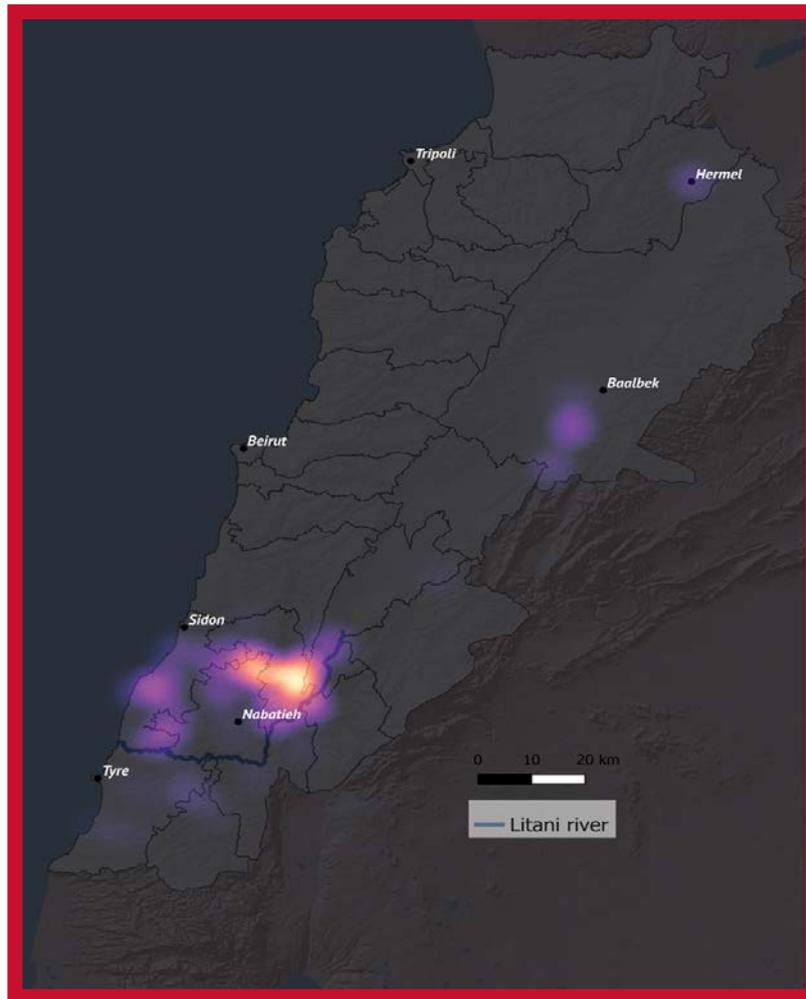
Maariv, [המוסד שבר את החשאיות מול איראן והתחרט: "בכל מקום" | אלון בן דוד](#) January 10, 2026

<sup>18</sup> LCAT logs all Israeli airstrikes across Lebanon reported by Lebanon's National News Agency, L'Orient Today, and Al-Mayadeen. LCAT logged 118 airstrikes from January 1-25, 2026, 72 in December 2025, 84 in November 2025, 95 in October 2025, 76 in September 2025, 71 in August 2025, 105 in July 2025, 101 in June 2025, 101 in May 2025, 71 in April 2025, 117 in March 2025, 61 in February 2025, 29 in January 2025, 75 in December 2024, and 11 from November 27-30, 2024.

<sup>19</sup> L'Orient Today, [Lebanon and Israel hold their first direct talks in over 40 years](#) December 3, 2025

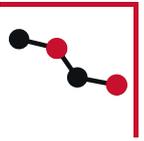
<sup>20</sup> Al-Modon, [هل تمهد المبعوثون لاتفاق أقرب إلى "17 أيار" جديد](#) January 19, 2026;

Al-Hadath via X, [@Alhadath\\_leb](#) January 19, 2026



**Figure 2:** Heatmap of 118 Israel airstrikes in Lebanon between January 1-25, 2026.

- **The Lebanese government’s efforts to begin implementing Hezbollah’s disarmament north of the Litani River could stall.**
  - Lebanon’s political leaders might wait for a resolution of the Iran crisis before forging a broader political solution to facilitate the next stage of Hezbollah’s disarmament in way that avoids civil strife.
  - If Lebanon begins disarmament north of the Litani without a political compromise acceptable to Hezbollah, US tensions with Iran might prompt Hezbollah to adopt a less compromising stance regarding disarmament efforts.
  - If the US and Iran start diplomatic talks, Washington and regional actors would likely attempt to push Tehran to make concessions on Hezbollah’s arms or its cooperation with the LAF on disarmament.
  - In turn, Iran might attempt to use Hezbollah’s arms as a bargaining chip and discourage Hezbollah from offering any concessions to the Lebanese state on its disarmament outside of areas south of the Litani.
  - Historically, grand bargains in Lebanese politics are facilitated by agreement among foreign powers.



## 2. Limited, one-off US strikes on Iran

### **Context:**

In this scenario, the US carries out limited, one-off strikes on Iran, aiming to prevent a protracted conflict, while also attempting to preserve the possibility of renewed diplomacy and coerce Tehran to accept US demands. The US objective would be for Iran to either not retaliate or to conduct a symbolic response. This aim would echo the US strikes on Iranian nuclear facilities on June 22, 2025, which enabled Washington to mediate a ceasefire between Tel Aviv and Tehran two days later. At the time, Iran responded to the US attack with a limited missile strike on a US base in Qatar, providing Doha with advance notice of the operation.<sup>21</sup> The US may also seek to replicate the outcome of its January 3 military operation in Caracas to capture then-Venezuelan President Nicolás Maduro, which did not trigger a Venezuelan retaliation. Washington has since pressed Caracas to concede to US demands on petroleum resources and other issues.

How this scenario unfolds is highly variable. While the US and Iran might aim to avert a wider conflict, miscalculations from either side could lead to further escalations:

- A properly calibrated, one-off US strike could be met with a symbolic Iranian response, paving the way for military de-escalation.
- A misjudged US attempt at a one-off strike, such as attempts to assassinate Iran's supreme leader and top security officials, could trigger a significant Iranian military response:
  - An Iranian missile and/or unmanned aerial vehicle (UAV) attack on Israel would likely prompt a conflict with Israel.

An Iranian strike on US military facilities that inflicts casualties and/or severe damage

- would likely prompt further US strikes on Iran, and the potential of a rapidly widening conflict that could involve Israel.

### **Impacts on Lebanon**

- **A US one-off strike that prompts no Iranian retaliation, or a symbolic one, with no further military action:**
  - No immediate security impacts on Lebanon.
  - The possibility that the US maintains its military build-up and employs coercive diplomacy. **(see Scenario 1 for details)**
- **A US one-off strike that prompts military escalation and wider conflict**
  - Increases the risk of Hezbollah entering the conflict.
  - Potential trigger factors for Hezbollah joining hostilities include Israeli strikes on Iran or US and/or Israeli assassination attempts against Iran's leadership. **(see Scenario 3 for details)**

<sup>21</sup> The New York Times, [Trump Says 'Time for Peace' After Iran Gives Warning Before Firing on U.S. Base](#) June 23, 2025



### 3. Significant US military action against Iranian political, military, and/or security personnel and/or infrastructure

#### Context:

In this scenario, the US launches military operations aiming to significantly diminish the Iranian ruling authorities' hold on power. While Washington would likely aim for quick and overwhelming action, it runs the risk of starting a protracted conflict that could last for weeks or more. The US could try to compromise Iran's leadership and hamper the country's retaliatory capacity by attempting to assassinate top political figures – including Supreme Leader Ayatollah Ali Khamenei – as well as military and security officials. The US might also strike Islamic Revolutionary Guard Corps (IRGC) infrastructure and Basij paramilitary forces, both of which help underpin Iran's ruling system.<sup>22</sup> In this scenario, a US attempt to militarily impose a change of Iran's ruling system would likely be met with Iranian retaliation; Tehran has threatened that it could strike Israel, US military bases in the region, or disrupt commercial maritime traffic.<sup>23</sup> This scenario has an elevated probability of Israeli military involvement, which would be triggered if Iran retaliates by striking Israel.<sup>24</sup> Alternatively, Israel could join the US operation from its onset.<sup>25</sup> Finally, although a more remote possibility, this scenario could be triggered by a pre-emptive Iranian strike if the country's leadership perceives an imminent and existential threat to its hold on power.

#### Impacts on Lebanon

##### Security

- Israel is likely to avoid escalating its campaign against Hezbollah in Lebanon, prioritizing military readiness for a possible conflict with Iran.
  - If Israel and Iran exchange fire, Tel Aviv would continue its military operations against Hezbollah but not trigger retaliation from the group. Israel's June 13-24, 2025 conflict with Iran did not significantly impact its operations in Lebanon, with Tel Aviv staging an average of 3.1 strikes per day in this period compared to an average of 3.5 per day during the rest of the month.
  - Since the start of the CoH on November 27, 2024, Hezbollah has undertaken a single military operation against Israel on December 2, 2024, which it called an "initial and defensive warning action."<sup>26</sup> Hezbollah did not conduct any military operations against Israel in support of Iran during the June 13-24 conflict, arguing that Tehran was capable of confronting Tel Aviv on its own.<sup>27</sup>
  - However, an Israeli conflict with Iran would elevate the risk of Hezbollah's involvement. A combination of Israeli and US strikes aiming to depose or significantly weaken Iran's leadership might prompt Tehran to call on Hezbollah to open a front with Israel.
  - If Hezbollah were to target Israel alongside Iran, Tel Aviv would likely initiate a widescale bombing campaign in Lebanon in retaliation. (See LCAT's report [Scenarios of Potential Escalation](#))

<sup>22</sup> The Economist, [The War Room newsletter: Three ways Donald Trump could strike Iran](#) January 26, 2026

<sup>23</sup> Washington Post, [In Iran crisis, Trump confronted limits of U.S. military power](#) January 17, 2026;

Times of Israel, [Iran threatens to hit Israel in response to any US strike; Israel said to be on high alert](#) January 11, 2026;

Lloyd's List, [Iran threatens to attack 'shipping centres' if US strikes](#) January 12, 2026

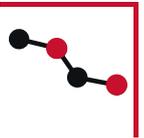
<sup>24</sup> On January 19, 2026, Israeli Prime Minister Benjamin Netanyahu said, "If Iran makes a mistake and attacks us, we will act with strength that Iran hasn't yet known."

Times of Israel, [Netanyahu: If Iran attacks Israel, 'we will act with strength that Iran hasn't yet known'](#) January 19, 2026

<sup>25</sup> The Guardian, [Iranian government braces for possible attack as US navy arrives in region](#) January 26, 2026

<sup>26</sup> National News Agency, ["ردا على الخروقات الاسرائيلية: نفذنا ردا دفاعيا اوليا تحذيريا واستهدفنا موقع روسيات العلم لان المراجعات لوقف الخروقات لم" تفلح](#) December 2, 2024

<sup>27</sup> National News Agency, [الشيخ قاسم: العدوان الاسرائيلي على ايران لن يمر دون رد وعقاب](#) June 13, 2025



- **Hezbollah may launch military operations targeting Israel if it perceives that Iran's ruling system is facing an existential threat or is ordered to do so by Tehran.**
  - If ordered by Ayatollah Khamenei to attack Israel, Hezbollah would be ideologically bound to do so by its adherence to the Velayet e-Faqih doctrine, which grants the supreme leader total political authority.<sup>28</sup> In theory, Hezbollah Secretary-General Naim Qassem could defy these orders, but such a move would likely severely deepen reported rifts in the party between military hawks and political pragmatists.<sup>29</sup>
  - On January 26, 2026, Qassem said that his organization would not remain neutral during a potential US and/or Israeli military offensive on Iran. However, he was vague on what Hezbollah's policy would be if Iran came under attack, saying such decisions would be determined by the "details of the battle."<sup>30</sup> His comments could be interpreted as trying to contain Hezbollah's military hawks, who may favor full Hezbollah involvement in an Iran-US conflict.
  - A potential assassination of Khamenei by the US could trigger Hezbollah to take military action. As the group appears to lack the military capacities to target US bases in the region, its most likely action would be against Israel. On June 19, 2025, Hezbollah said that threatening to kill Khamenei was reckless and it would have dire consequences.<sup>31</sup>
- **The Lebanese government's efforts to begin implementing Hezbollah's disarmament north of the Litani River could stall.**
  - Lebanon's political parties would likely opt to wait for the resolution of a conflict in Iran before attempting to forge a solution on Hezbollah's arms that prevents civil strife.
  - Hezbollah might be less willing to coordinate if the LAF begins disarmament efforts and Hezbollah perceives that it is being cornered amid a military campaign against Iran.
  - Historically, grand bargains in Lebanese politics are facilitated by agreement among foreign powers.

<sup>28</sup> L'Orient Today, [Iran-Israel war: Can Hezbollah defy an order from Tehran?](#) June 21, 2025

<sup>29</sup> L'Orient Today, [Could Hezbollah survive the fall of the Iranian regime?](#) January 21, 2026

<sup>30</sup> National News Agency, [قاسم في لقاء تضامني مع ايران: الحرب عليها هذه المرة قد تشعل المنطقة وأمام العدوان لسنا حيايين والتفاصيل تحددنا المعركة](#) January 26, 2026

<sup>31</sup> National News Agency, ["حزب الله": التهديد بقتل الإمام الخامنئي حماقة وتهور له عواقب وخيمة](#) June 19, 2025;

National News Agency, [قاسم في لقاء تضامني مع ايران: الحرب عليها هذه المرة قد تشعل المنطقة وأمام العدوان لسنا حيايين والتفاصيل تحددنا المعركة](#) January 26, 2026



### Economic/Humanitarian

- **A wider regional conflict that does not involve Hezbollah would pose potentially significant economic impacts on Lebanon as well as knock on humanitarian effects.**
  - A wider conflict risks severely disrupting energy markets. If Iran’s leadership perceives a threat to its hold on power, it could attempt to disrupt traffic through the Strait of Hormuz<sup>32</sup> – a vital sea passage accounting for approximately a quarter of global maritime petroleum trade – or attack regional energy infrastructure, such as refineries.<sup>33</sup>
  - Lebanon is dependent on fuel imports, including diesel, gasoline, and liquefied petroleum gas (LPG). High fuel prices would have a direct, negative impact on Lebanese residents’ livelihoods.
  - Since public electricity provision is limited to a few hours per day, most of the country – including households and key state utilities such as telecoms and state water providers – relies on diesel-powered “backup” generators.
  - Such military actions would lead to a hike in fuel prices in the Lebanese market. This would entail higher fuel costs for Lebanese households’ electricity, heating, and cooking, which many would struggle to afford.
  - It would also entail higher costs for state utilities relying on fuel for backup generators, stressing state budgets and potentially disrupting essential services. Higher fuel costs would also put pressure on other key sectors, such as hospital facilities.
  - In June 2025, when Israel and Iran were locked in a 12-day conflict, eastern Mediterranean diesel cargo prices increased by 12 percent.<sup>34</sup> Diesel prices in Lebanon hit a one-year high during the June 13-24, 2025 conflict, before beginning to ease in mid-July 2025.<sup>35</sup>
  - If Iran damages energy infrastructure in the Gulf region or the conflict hampers freedom of movement of oil tankers, an even higher spike in diesel prices should be expected.
- **A wider regional conflict that military involves Hezbollah could have catastrophic economic and humanitarian consequences for Lebanon**
  - Hezbollah’s military involvement in the conflict would likely lead to a widescale conflict with Lebanon, like the ones in September-November 2024 and July-August 2006.
  - Widescale Israeli military action would result in significant casualties, damage and destruction to homes and infrastructure, and compromised humanitarian operations. (For an in-depth analysis see LCAT’s report [Scenarios of Potential Escalation](#))

<sup>32</sup> On January 11, 2026, Iranian Speaker of Parliament Mohammad Ghalibaf threatened that Tehran could strike shipping centers in retaliation to a US military attack, an implicit threat against the Strait of Hormuz. Iranian political and military figures in the past have raised the possibility of choking off traffic through the Strait, including in the June 13-24, 2025 conflict with Israel, but has not followed through with the threat.

AFP, [Iran Would Target US Military, Shipping If Attacked: Parliament Speaker](#) January 11, 2026;

Al-Jazeera, [What is the Strait of Hormuz, could it factor into Israel-Iran conflict?](#) June 14, 2025;

CNBC, [World’s most vital oil chokepoint back in focus amid possible U.S. action against Iran January 12, 2026;](#)

European Council on Foreign Relations, [Traps and limits: Why Trump bombing Iran won’t deliver what he wants](#) January 27, 2026

<sup>33</sup> In the June 13-24, 2025 Israel-Iran conflict, Israeli airstrikes targeted Iranian energy infrastructure. A reprise of such strikes in the context of wider military escalation increases the risk of Iran retaliating against regional oil installations. A European Council of Foreign Relations report contended this could be a potential policy pathway for Iran, which maintains the military capacities to undertake such attacks.

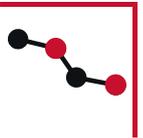
Deutsche Welle, [Why Israel is hitting Iran’s vital energy infrastructure](#) June 16, 2025;

European Council on Foreign Relations, [Traps and limits: Why Trump bombing Iran won’t deliver what he wants](#) January 27, 2026

<sup>34</sup> LCAT reviewed diesel cargo prices in the Eastern Mediterranean published in OPEC’s Monthly Oil Market reports from March 2025 through January 2026, covering the full year of prices in 2025.

OPEC, [Monthly Oil Market Reports](#) January 18, 2026

<sup>35</sup> IPT, [Fuel Prices](#) January 18, 2026



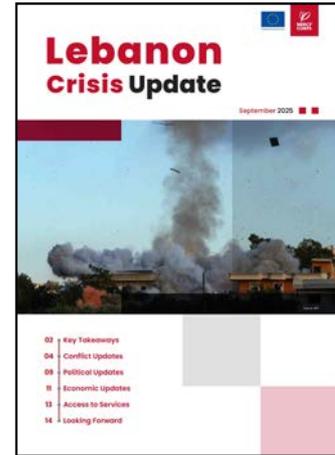
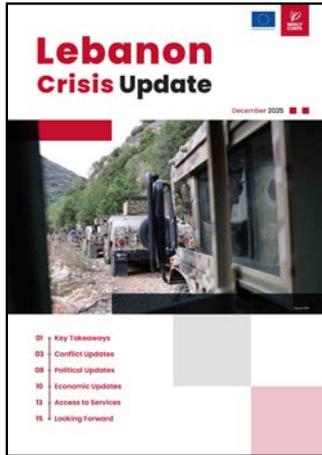
- **Any exchange of fire between Iran and Israel, without the entry of Hezbollah into the conflict, could lead to closure of Lebanese airspace or disruption of flights**
  - A wider conflict that involves Hezbollah would likely prompt a severe disruption of flights into Lebanon. The country's national air carrier Middle East Airlines (MEA) continued services in the September-November 2024 conflict, while foreign airlines ended theirs.
  - In the June 13-24, 2025 conflict, European carriers reduced their flights to Lebanon, leaving MEA as the most reliable carrier during that time.<sup>36</sup>
  - The first quarter of the year is traditionally one of the slowest periods at Beirut's Rafik Hariri International Airport. While flight cancellations and fears of a wider conflict would affect tourism in these months, the impact would be softened by potentially strong tourism seasons in the summer or winter.

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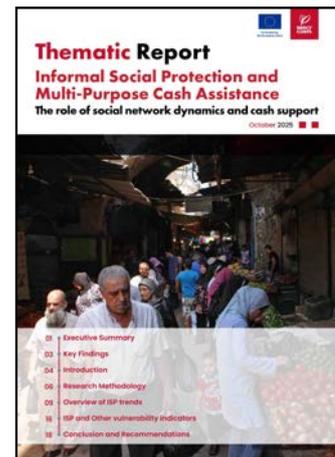
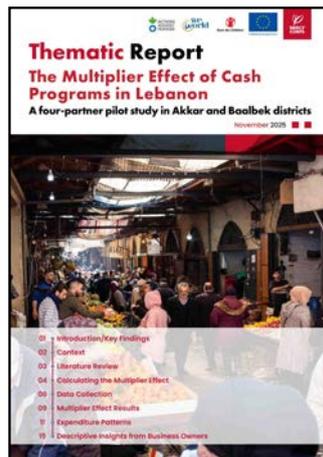
<sup>36</sup> L'Orient Today, [Additional MEA flights between Beirut-Istanbul, Emirates suspends its flights to Lebanon until June 22](#) June 15, 2025;  
L'Orient Today, [Beirut Airport: Flights canceled after Israeli strikes in Iran](#) June 13, 2025



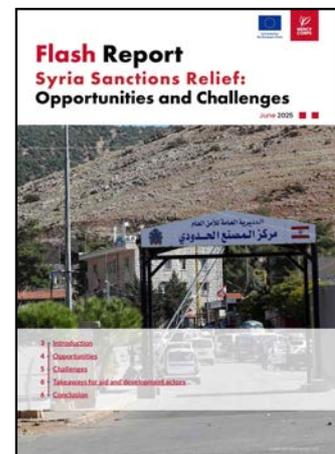
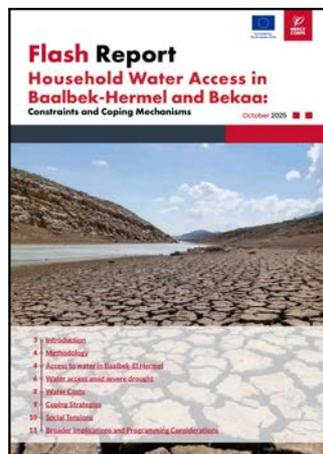
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