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Iran's "Axis of Resistance" post Hezbollah and Hamas Setbacks: Debate of Direct confrontation and Deterrence through proxy

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ABSTRACT

The Islamic Republic has been relying on a mix of proxy threats on multiple levels rather than direct military ones for four decades, and it has been cultivating a "Axis of Resistance" of Hezbollah, Hamas, the Houthis and other more-or-less coordinated militias in Iraq and Syria under the auspices of the Islamic Revolutionary Guard Corps–Suds Force (IRGC-QF). This architecture had to withstand the harshest series of blows in its history, from the beheading of Hezbollah's top leadership, to the assassination of successive Hamas chiefs, to the fall of the Assad regime, to at the end of the day the joint US-Israeli strike (Operation Epic Fury/Operation Roaring Lion) in February 2026 that killed Supreme Leader Ali Khamenei and dozens of top officials, leading to an unprecedented leadership crisis. This article examines whether these repeated failures have rendered deterrence by proxy strategically irrelevant, positioning Tehran towards direct confrontation risk, or if the network's decentralized, 'cellular' structure means it can be degraded at different points, but still fulfill its basic strategic role. The structured-focused comparison, by individual nodes, over the five nodes, and across five network types including the 2026 war, reveals that the axis is more successful with respect to organizational survival than its success with respect to strategic deterrence: individual nodes are able to regenerate leadership and rearm, while the aggregate ability to impose costs on Israel and the US without provoking direct retaliation against the Iranian homeland has been broken. What's left is not an end of the axis, but a shift in its character from a more centralized, less locally based collection of insurgent and political actors to one that is less controllable from the center and more locally based, with Iran now having a qualitative increase of risk from direct war. The analysis is informed by about 50 sources, including peer-reviewed sources in the literature on proxy warfare and deterrence theory, think-tank and open-source intelligence reporting, and primary government and UN documentation.

Keywords: Iran, Axis of Resistance, Hezbollah, Hamas, Proxy Warfare, Deterrence, IRGC, Operation Epic Fury, Forward Defense, Middle East Security

Introduction

Iran's regional policy since the Iran-Iraq war has been based on one, and one alone, assumption: that a country with a conventional military force that is weaker than its primary opponents Israel, the Gulf monarchies and the U.S, can achieve regional strategic depth and deterrence through non-state means. Known as "forward defense," this model saw Hezbollah, Hamas, Iraqi Shia militias and, more recently, the Houthis as the "tripwires" and "retaliatory" weapons that would take a hit if Iran were targeted directly, but allow Tehran plausible deniability and escalation control (Ostovar, 2016; Tabatabai, 2020). This model seemed to be working as intended between

2019–2024 as the attacks on U.S. bases, the seizure of tankers and the Hamas assault on Israel on 7 October 2023 failed to spark state-to-state conflict between Iran and its main adversaries. This balance has been disrupted for 18 months, starting from mid-2024. Israel's strike against Hezbollah ended after the organization's top leader, Hassan Nasrallah, was killed in Beirut, as well as several of its top military officials, in September 2024, after Fuad Shukr, the organization's military commander, was killed. In October 2024, Hamas' Gaza leader, Yahya Sinwar, was ousted and its political bureau chief Ismail Haniyeh, who was assassinated in Tehran itself in July 2024, also lost in this period. During this period, Hamas's Gaza leader, Yahya Sinwar, was removed, and the head of its political bureau, Ismail Haniyeh, was assassinated in Tehran itself in July 2024, with direct implications for the credibility of Iran's deterrence. The Assad regime came to an end in December 2024 when it fell under a rebel offensive, which Iran and Hezbollah both absorbed by their own losses are unable to counter and have cut off the weapons pipeline for the axis as it had developed over more than a decade. In June 2025, United States, Israel and Iran were at war for 12 days with a direct strike against the Iranian nuclear and air-defense facilities. Lastly, on 28 February 2026, Operation Epic Fury and Operation Roaring Lion commenced with a coordinated strike dubbed as 'the decapitation strike' in which Khamenei himself and dozens of senior officials were killed, an attack that had not even been dreamed of by the Islamic Republic's history.

This sequence brings up the key point that this article poses: has the gradual attrition of Iran's proxy network made deterrence by proxy a dead strategic policy, moving Iran up to a higher and more direct risk of confrontation with Israel and the U.S. or is the proxy network so decentralized that it can still be a working albeit limited tool of Iranian statecraft? The question is a more than Iran question. It fits into a larger discussion in security studies on the weakness of proxy deterrence relative to direct deterrence (Rauta, 2021; Salehyan, 2010), which is based on the power of the proxy to control the escalation dynamics, which remain under the control of the sponsor.

This paper proposes an empirical timeline of the degradation sequence (2024-2026). Here, we introduce an empirical timeline of degradation sequence (2024-2026).

Phase One: Decapitation of the Lebanese and Palestinian nodes (2024)

The degradation started in the acute phase in mid-2024. On 30th July 2024, Israel struck to kill Hezbollah's senior military commander Fuad Shukr in southern Beirut, hours after the killing of Hamas political bureau chief Ismail Haniyeh in Tehran, which Iran blamed on Israel and marked the first time that Israel has breached a sovereign Iranian land in the past 16 years (Gulf News, 2024). In August and September 2024, Israel's operations against Hezbollah were stepped up, leading up to the death of the party's leader, Hassan Nasrallah, and the majority of his high command in a series of strikes in late September 2024 in the southern suburbs of Beirut in the Lebanese capital (Foreign Affairs, 2026; TCF, 2025a). In October 2024, Israeli troops took down Gaza's Hamas leader, Yahya Sinwar, in a ground invasion in the city of Rafah in the southern Gaza region, approximately two weeks later. The "blocking third" veto on cabinet decisions that had been in place in Beirut for more than ten years thanks to Hezbollah was lost in February 2025, as post-war Lebanese politics changed (TCF, 2025b).

Phase Two: The Syrian collapse and Hamas's leadership churn (December 2024, mid 2025)

During Phase Two (December 2024-mid-2025), the Syrian collapse and the change in Hamas leadership are expected to take place. Neither Hezbollah nor Iran had the capacity to make much of a difference when a rebel offensive in late November early December 2024 penetrated Syria and toppled the Assad regime on 8 December 2024. Prime Minister Benjamin Netanyahu and Israeli officials in general viewed the collapse of Assad's regime as a direct result of the previous

attacks on Hezbollah and Iran, considering it to be a "chain reaction" in the region (GlobalSecurity.org, 2024). The destruction of Syria cut off the main overland supply route for Iran since the 1980s to resupply Hezbollah, and increased the usage of maritime and Iraqi supply routes (AEI, 2025). Meanwhile, Hamas' leadership in the Gaza Strip was plunged into a whirl of fast-swapping its leadership. Mohammed Sinwar took over after his brother Yahya died in October 2024, but was killed by Israel in attack on the Gaza European Hospital, in May 2025. He was followed by Izz al-Din al-Haddad, who was also killed in June 2025 and May 2026, respectively (FDD, 2026), and who later became a pro-Iran hardliner, Mohammed Odeh, who has since resisted calls for disarmament under the Gaza ceasefire framework. The rate of this turnover killing or replacing four Gaza leaders in the last 19 months or so is itself a data point on the stress of the organization, but again, following the literature on resilience, Hamas' command structure did not fall apart, but regenerated at each iteration, usually within weeks.

Phase Three: The twelve-day war and the road to Operation Epic Fury (June 2025 – February 2026)

In June 2025, the US and Israel launched a twelve-day attack on Iranian nuclear facilities, air defenses and missile infrastructure, both of which described as being severely degraded Iran's ability to retaliate (Stimson Center, 2025). Through the end of 2025, Iran's economy continued to suffer under the weight of the sanctions, and by the end of 2025, there were mass protests throughout the country, which were brutally suppressed by the IRGC/Basij resulting in several thousand deaths, according to Iranian human-rights monitoring groups (AJC, 2026). In February 2026, a third series of Omani-brokered nuclear talks in Geneva ended without success diplomatically, although mediators reported that "significant progress" (Times of Israel blog, 2026) was made a fact that President Trump noted in public, and which led to his dissatisfaction during the talks. The invasion of the Chancellorsville region and the assassination of Khamenei happened during Phase Four 28 February – 5 May 2026.

Iran struck back in a multi-faceted way, addressing each attack. Hezbollah responded with a barrage of missiles into Israel within 48 hours "in solidarity" with Tehran, leading to renewed Israeli air strikes and a ground incursion into southern Lebanon over 10 kilometers into the territory which displaced more than a million Lebanese civilians (Times of Israel, 2026a). In the first eleven days of the war alone, Iraqi militias under the umbrella of the Islamic Resistance in Iraq and Popular Mobilization Forces, have been estimated to have launched 290 attacks against US and partner-state targets in seven of the country's governorates as a result of sustained US retaliatory strikes that killed dozens of militia fighters in those same days across seven governorates (Times of Israel blog, 2026). In contrast, the Houthis, who were the closest and most rugged Yemenis to Israel and, before the war, were considered to be Iran's most viable target in the Red Sea (Stimson Center, 2025), were seen as exercising "restraint" in their response to this war, with specialist analysts concluding that the Houthis were not only operating with restraint, but were also following a "phased escalation" strategy (Times of Israel blog, 2026).

Shortly after his first public announcement on 13 March 2026, New Supreme Leader Mojtaba Khamenei made the commitment to keep the Strait of Hormuz closed as a pressure weapon and even when the price of Brent crude overtook \$100 per barrel for the second time in the war, there was a coordinated release of 400 million barrels from global strategic reserves (Global Security.org, 2026a).

In May – September 2026 (Phase Five), the war's aftermath and unresolved conflicts will be explored. The war left two parallel and uncoordinated disarmament processes, one of which was the removal of tanks and the other the removal of artillery. Tanks were removed in a separate process from the removal of artillery, the latter being the other. In Lebanon, negotiations to

verify Hezbollah's disarmament in the framework of the Lebanese Armed Forces' "Homeland Shield Plan" (adopted in September 2025) were agreed upon on 26 June 2026 to be held in Rome in August 2026, while Israel and the United States vetoed French involvement (Times of Israel, 2026b; US News/Reuters, 2026), leading to a shortlist of potential monitoring states being created, which Israel and the United States opposed. Hezbollah continued to refuse to disarm completely and Lebanese political parties were split on how to ensure its disarmament, and the UN Security Council had already ordered UNIFIL to end its mission and withdraw by the end of 2026 (Amit Institute, 2026; Diplomacy and Law, 2026).

A 20-point ceasefire agreement that was implemented in Gaza on 10 October 2025 was also doomed to fail due to the question of Hamas' disarmament. The UN-mandated Board of Peace and a technocratic National Committee for the Administration of Gaza (NCAA) were created following Security Council Resolution 2803 (2025) and the UN's own Middle East envoy in April 2026 characterized the ceasefire as the "increasingly fragile" state it was in after Israeli strikes continued at a near-daily pace, and disarmament talks had failed to reach an agreement (UN DPPA, 2026). In July 2026, Hamas announced it would dismantle its government in Gaza, while simultaneously denying to discuss disarming the coastal enclave, though it gave some indication of willingness to a "phased roadmap" for disarmament set to be brokered by Egypt, Qatar and Turkey, which as of September 2026 still had not seen a complete Israeli withdrawal of its forces from the Gaza Strip (CNN, 2026; Al Jazeera, 2026a; Al Jazeera, 2026b; Chatham House, 2026).

Node-by-Node Assessment

Hezbollah

The most pronounced difference between organization survival versus deterrent is that of Hezbollah. In September 2024, its senior command was decimated, but it had some institutional depth so that it was able to re-mobilize militarily within 48 hours of the outbreak of the war in February 2026 an example of the resilience thesis. Hezbollah at the same time found itself entering the post-war era without a parliamentary veto in Lebanon, a state that now more than ever was eager to have Hezbollah disarmed under continued pressure from the US and Israel; and without its main supply route over Syria after Assad's regime fell. An ongoing refusal to accept complete disarmament August 2026 shows that Hezbollah is still alive and active in Lebanon, but it is no longer the first line of defense to deter Iran, which it was for two decades. Organization's survival and continued political relevance in Lebanon is evident through an ongoing refusal to accept full disarmament (August 2026), although its capability to act as a credible first line of defense to deter Iran has been significantly diminished by leadership loss, logistics disruption, and loss of political leverage in Lebanon.

Hamas

The ability to reorganize the armed forces, to recruit despite the killing of its members, and to continue to recruit while formally negotiating arms reduction as Hamas shows is a capacity that is often overlooked by literature on armed group resilience. The capacity to reorganize armed forces, to recruit soldiers even during mass killing, and to take steps to rearm while openly negotiating arms reduction as Hamas demonstrates is something that is hardly addressed in the literature on armed group resilience. Hamas's relationship with Iran, however, always had been the most transactional link in the chain (Byman, 2011), and in the event of war in 2026, this was true, as well; in one analysis, Hamas was not a player in Iran's direct retaliatory campaign, but rather a "symbolic and strategic" one (National Interest, 2026). Hamas' post-war path has been more focused on Palestinian governance and negotiating with Israel, the Board of Peace and Arab mediators, than on its contribution to the Axis of Resistance's overall deterrent power, an

argument that is reinforced by the fact that Hamas' failures have an impact on Palestinian politics rather than the overall deterrent power of the Axis of Resistance.

The Houthis

The Houthis are the network's most resilient node, precisely because they have the structural attributes that were identified in pre-war evaluations that made it difficult for Israel to penetrate Hezbollah (Stimson Center, 2025) the creation of a network that lies far from Israeli territory, is difficult terrain, and is organized by tribes that are less susceptible to intelligence than others. Their cautiousness in the first weeks of the war in 2026, despite loud calls for support of the Houthis from Tehran, is the most theoretically intriguing observation in this study: it seems as if they had a "hands-off" strategy to escalate their involvement in the collective defence network, rather than a sign of incapacitation, and fits well with Rauta's (2021) transactional end of the principal-agent continuum.

Iraqi Shia militias:

The most immediate node to become mobilizable in Operation Epic Fury were Iraqi militias that were coordinated through the IRGC-QF's forum (tansiqiyah, formed by Quds Force commander Esmail Qaani in about 2020) and operated on a high tempo of about 290 claimed attacks in eleven days despite significant losses (CTC West Point, 2026a). Continued, and perhaps increased, Iran investment in this node is seen as rational, especially in light of Iraq's relative weakness in the capacity to enforce disarmament, and its proximity to both US regional bases and Iran itself, as reported IRGC transfers of new ballistic and cruise missile systems to these militias as early as April 2025 (AEI, 2025) indicates.

The Syrian vacuum

There is no doubt that Syria is the biggest node of total loss for the network. Its demise in December 2024 not only resulted in the fall of one ally of the axis, but the axis's connective tissue between Iran and Hezbollah and Iranian and Iraqi militias. In contrast to Hezbollah, Hamas, or the Houthis, this loss demonstrates no indication that the reconstitution dynamic elsewhere took place: there is no sign that there was a new entity of similar size and importance to take the place of Assad, nor did Iranian officials including Khamenei offer evidence of a rebuilt operational presence, only a rhetorical call to arms from Iranian-backed actors in Syria aimed at the country's "liberation." (AEI, 2025)

Discussion: Deterrence-by-Proxy or Direct Confrontation?

The evidence that is gathered here allows a better question formulation of the central question of the article. But deterrence-by-proxy is not off the table as a policy choice, as Iran continues to act to equip Iraqi militias, to allow Hamas to get ready with arms under ceasefire agreements, and to rhetorically if not practically build its own military presence in Syria. The difference is that the credibility of the network as a means of dealing a blow to Iran itself is gone. That's in no small part because Operation Epic Fury the very one a deterrence-by-proxy model was crafted to stop took place, attacking the Supreme Leader directly, just as a network of proxies that wasn't entirely destroyed was still capable of operating and creating the same kind of chaos within days. Deterrence-by-proxy requires uncertainty on the part of the adversary about the willingness and capacity of the network to retaliate in a "proxy" manner, which means a costly, coordinated manner. By early 2026, the United States and Israel had eighteen months of evidence of the muted or delayed reactions to the Nasrallah, Haniyeh, and Sinwar killings and the collapse of the Assad regime, and thus, no single node (and no combination of nodes less than Iran's own direct involvement) would have the power to inflict costs that would discourage further escalation. In other words, it is these repeated interactions that had begun to dissolve the ambiguity that is crucial to deterrence by proxy, which are consistent with formal treatments of deterrence theory

in terms of reputation and credibility (Freedman, 2022; Byman, 2025). But as soon as the confusion cleared, the strategic rationale shifted: the fact that the network has been activated be it Hezbollah re-entering or the increased frequency of Iraqi militias attacks, or Iran's own missile and drone barrage became another reason for strikes not just to be considered "retaliatory", but "pre-emptive" or "decapitating". In parallel, the war itself shows that the two categories of "direct confrontation" and "proxy network" are not antagonist, but rather are increasingly getting closer together. During the war, Iraqi militias and Hezbollah targeted US and Israeli forces and during the conflict, the network operated, in a rather limited operational sense, as it is designed to do as a distributed retaliatory force that attacked during a direct Iran/US/Israel war, not as an alternative to it. The network's ability to combat was not the problem, its ability to stop the war coming in the first place, and its ability to force a ceasefire that would be favorable to Tehran, the ultimate outcome of the war, a ceasefire negotiated from outside, followed by a naval blockade, shows that the network failed to achieve cost avoidance. The distinction is important when it comes to policy analysis: those who attribute continued attacks in Iraq from the militias and re-engagement from Hezbollah to the axis's "survival" do not seem to recognize that attacks continue at a similar rate, but deterrent value has not been restored, and here the evidence is not on their side.

Another factor complicating matters is the misalignment of local political interests and Tehran's regional strategic interests of the nodes. Hezbollah's and Hamas' post-war postures are more and more focused on domestic political survival issues, from Hezbollah's disarmament negotiations with the Lebanese state to Hamas' governance negotiations in the Gaza Strip rather than on the regime's agenda in Tehran. This is in accord with the principal agent literature that predicts that agent action will be less in line with the principal preference as soon as the costs to the agent of maintaining its survival increase (Salehyan, 2010; Rauta, 2021) and it implies that even with a complete Iranian strategic swing toward material resupply, the loss of the local incentive alignment will be a more constraining constraint.

Findings:

In this analysis four findings emerge. First, there is empirical evidence that organizational resilience and deterrent value are distinct concepts and have diverged significantly over the last three years: most nodes Hezbollah, Hamas, Iraqi militias showed evidence of being resilient and operating in a decentralized network, and the network's overall deterrent value against direct attacks on Iran fell, with Operation Epic Fury itself being the proof. Second, there is a lot of variance in the nodes, and this variance is predictable from variables identified in the principal-agent literature: nodes with more geographical isolation and nodes that are more autonomous from Iran, the Houthis were the most free to act, and the node most institutionally connected to Hezbollah, which is embedded within the IRGC-QF experienced the greatest leadership attrition, suggesting the highest level of exposure to Israeli intelligence penetration. Third, the collapse of the Syrian node does not affect the other nodes in the same way; the others may be degraded, but not completely obliterated, as was the Syrian node. Third, the collapse of the Syrian node is the largest structural event in the network other than the degradation of the other nodes, as it cuts off overland supply lines without any other alternative routes available. Fourth, the way the axis has been used to address the war resolution issues externally mediated ceasefire, disarmament diplomacy in Lebanon and Gaza, and a subsequent US naval blockade of Iran shows that its role in post-war is evolving from a deterrence instrument to a role as a bargaining chip in negotiations concerning regional order, which is a materially different strategic function than the one it was intended to serve.

Conclusion and Policy Implications:

All the evidence suggests that Iran's Axis of Resistance has not come to an end, but rather its primary role deterrence by proxy instead of direct conflict has been greatly undermined. The first, and most clear-cut, test of the model will be the coming war between February and May 2026, and the model failed its principal mission namely, the failure to stop an attack on the Iranian homeland and its Supreme Leader. What is left is a network that can still be called to action and could become locally relevant, but one whose dynamics are changing from a forward defense approach to a more reactive, locally situated network of insurgent and political actors that are more and more at variance with Tehran's interests.

To policymakers, three implications stem from this. Degrading Iran would surely cause the decline of its proxy network, but for a while the assumption that each node would vanish upon Iran's demise was only partially true: while the strategic goal faded, individual nodes operated longer than they should have, at least in the short term (Times of Israel blog, 2026). Second, the disarmament process in both Lebanon and Gaza are the two most significant unresolved variables for the medium-term future of the axis and will decide whether Hezbollah and Hamas will become disarmed political parties or continue to be low-level guerrilla movements or become the next flashpoints for more conflict. Third, the probability of renewed direct confrontation among Iran, Israel and the United States should be considered structurally higher, and not just a "tail risk," as it has already happened once, with a new and less experienced regime in Tehran.

There are some limitations of this study. The events analyzed are ongoing as of September 2026 and some facts are only preliminary and subject to further developments. Casualty figures in the war reporting literature are innumerable and, in casualty reporting, the figures for operational tempo are different from source to source and unverifiable by this writer. Last, the qualitative, comparative design does not claim to be able to assign causal weights to the different shocks, decapitation of leadership, logistics disruption, economic pressure as would possibly be provided by a formal modelling approach, which suggests that a quantitative approach is possible when event-level data becomes more systematic in the future.

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