
WEEKLY STRATEGIC ASSESSMENT

THE ESTIMATE

THE SITUATION IN LEBANON



CORE GROUP

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EXECUTIVE SUMMARY

The signed framework was expected to function as a codified stalemate, a document neither side implements, unless Israel converted a postponed pilot-zone vacation into a scheduled handover with army entry. That threshold moved this week. Washington declared the framework had entered its implementation stage, dispatched a military delegation to Beirut, and set a date: the first pilot zone, the twin villages of Zawtar al-Sharqiya and Zawtar al-Gharbiya, would see an Israeli vacation within days. That is the scheduled handover that would move weight off the stalemate scenario. It is also, as of Friday, an announcement and nothing more. No Israeli unit has vacated a position. No Lebanese army unit has entered one. Israel's own defense minister spent the week publicly rejecting the American president who made the announcement possible. President Trump said in Ankara that he believed Israel would withdraw from south Lebanon. Within twenty-four hours, Defense Minister Katz said flatly that Israeli forces would remain in the security zones for as long as needed and that disarming Hezbollah remains the precondition. That is a direct public contradiction between the sitting American president and the Israeli official who controls the forces on the ground. The framework has therefore acquired a schedule without acquiring a fact. It is a step closer to Scenario B and still short of it.

The ground campaign did not pause for the diplomacy. Israeli forces killed a Hezbollah operative emerging from underground infrastructure at Ali al-Taher and raised the Israeli flag over the hill. They fought a close-quarters engagement in Bint Jbeil that wounded three soldiers and killed a military dog, captured a Radwan Force operative days later, and killed a militant at Majdal Zoun. Two consecutive drone strikes on the same town, Nabatieh al-Fawqa, killed six civilians in the deadliest single attack in weeks, among them a school principal and a domestic worker returning from an inspection of their home. Demolitions continued across a widening list of towns. None of this rises to the intensity of 20 June, and the campaign's tempo has not spiked. It confirms that the framework's signature, and now its implementation announcement, coexist with an active kinetic front rather than replacing it. The wider region reignited around this narrower story. The United States and Iran resumed direct strikes after the collapse of the ceasefire memorandum. Iran struck Bahrain, Kuwait, and Qatar and hit tankers in the Strait of Hormuz. Iran's foreign minister named the Lebanon front explicitly as one of the reasons the wider understanding failed, coupling Beirut's fate to a war that has nothing to do with its own territory. Aoun broke from that axis to condemn Iran's strikes on the Gulf states as a violation of sovereignty and voice solidarity with the GCC, the sharpest pro-Gulf signal Beirut has sent this year.

The central question is whether the announced pilot-zone vacation converts into an actual Israeli withdrawal with Lebanese army entry inside the next seven days. The alternative is that Katz's public rejection of Trump's framing proves the operative Israeli position, leaving the announcement a diplomatic step with no physical follow-through.

CRITICAL QUESTIONS

- ◆ Does the Zawtar al-Sharqiya and al-Gharbiya vacation execute on the announced within-days timeline with a Lebanese army entry, or does it slip the way the Zawtar al-Gharbiyeh and Froun vacation slipped last month?
- ◆ Does Katz's rejection of Trump's withdrawal framing hold as Israel's operative position through the Rome talks, or does Washington compel a walk-back before the fifteenth?

- ◆ Does the wider US-Iran war's reabsorption of American and Iranian bandwidth slow the Lebanon implementation track it just accelerated, or does the sharpened regional confrontation give both sides reason to bank a visible Lebanon win quickly?

I. MILITARY & SECURITY THEATER

The toll kept rising, at a much slower pace. The dead now number 4,301 to 4,304 since 2 March, the wounded 12,199 to 12,203, an increase of three to six deaths over the past week. That is a markedly slower rise than the sixty-eight-dead increase recorded the week before. The tempo continues to fall from the 20 June peak. It has not reached zero.

Direct contact between the two forces continued at a similar cost to last week, concentrated on a narrower set of contested ground. Israeli forces killed a Hezbollah operative described as emerging from underground infrastructure at Ali al-Taher on 3 July and afterward raised the Israeli flag over the hill. Israel paired the act with claims of an extensive fortified tunnel system beneath it, holding dozens of fighters including Radwan Force members. Aoun said in an interview that Lebanon had asked Secretary of State Rubio to hand the hill to the Lebanese army, that Netanyahu had agreed, and that Hezbollah had rejected the transfer. The account rests on the presidency's own telling and carries no independent corroboration this week. The same day, a close-quarters clash in Bint Jbeil left one Israeli soldier seriously wounded and two lightly wounded, and killed a military working dog, after a fighter opened fire from inside a building during a reservist search operation. The Israeli military has opened an internal inquiry into the engagement, after a competing account suggested soldiers wounded the man and attempted to negotiate before killing him near his weapon. Israeli forces captured a Radwan Force operative in the same town days later and transferred him to Israel for interrogation. Israeli forces separately killed a militant at Majdal Zoun on 1 July. None of these engagements individually exceeds the scale of a routine week's contact, and together they confirm the ground fight that reopened after the framework's signature has not cooled.

The deadliest single strike in weeks killed civilians. An Israeli drone killed four people in a car near Nabatieh al-Fawqa on 6 July, a school principal, her mother, a domestic worker, and a Syrian laborer, all returning from inspecting a family home just outside the declared Yellow Line. The Israeli military said it struck four suspects approaching the security zone. Two days later, a second drone strike on the same town killed two more men walking near a hospital. The demolition campaign continued in parallel across Haddatha, Beit Yahoun, al-Qantaa, Khiam, Houla, Kounine, and Aitaroun. Israeli forces claim operational control of Haddatha after destroying more than ninety sites, killing more than twenty fighters, and seizing more than one hundred fifty weapons there over the preceding month. Israeli forces also sent recorded warnings to five Christian border villages in the Marjayoun district against what they described as Hezbollah infiltration, warnings the municipal heads confirmed receiving while stating no displaced persons remained in their towns to be endangered by them.

Israel's own officials spent the week contradicting the American who announced their withdrawal. Chief of Staff Lieutenant General Eyal Zamir, touring near Beaufort Castle, vowed the army would continue to operate decisively to remove threats from Lebanese territory. Defense Minister Katz restated on 5 July and again on 10 July that Israel will not withdraw from the Lebanese, Syrian, or Gaza security zones until its security objectives are met. He said Israel did not ask permission to enter Lebanon and needs none to stay, and that any Iranian attack tied to the Lebanon operations would draw a response with full force. The 10 July restatement came a day after President Trump said at the NATO summit in

Ankara that he believed Israel would withdraw from south Lebanon and was signing deals with Lebanon to that effect. Katz rejected the claim outright and tied it explicitly to Hezbollah's disarmament as an unmet precondition. Netanyahu separately denied, calling it fake news, that Trump had restricted Israeli operations against Hezbollah's tunnels, insisting Israel operates according to its own considerations. The pattern across all three statements is consistent. Whatever Washington announces about the pace of withdrawal, the officials who command the forces on the ground describe an indefinite hold.

The pilot-zone mechanism moved from principle to an announced schedule, without a single physical step yet taken. Washington will oversee the Israeli withdrawal from the pilot zones, and the first zone will launch within days. Ambassador Michel Issa said an American military delegation will arrive in Beirut in the coming days to determine the implementation mechanism on the ground and prevent a security vacuum, with United States Central Command coordinating the zones with both countries. Aoun named the first zone as the twin villages of Zawtar al-Sharqiya and Zawtar al-Gharbiya, an identification that updates, without formally reconciling, the Zawtar al-Gharbiyeh and Froun pairing named as the postponed pilot zone last month. Whether this reflects a substituted zone or a transliteration variance across reporting is not settled in this week's record. Separately, an Israeli broadcaster reported that Israel transferred a blacklist of Lebanese army officers barred from southern deployment through American mediators, a claim a Lebanese military source explicitly denied, with no official confirmation on either side. France and Italy continued preparing, at Lebanese request and with American backing, an international coalition to succeed UNIFIL's mandate in the south, though the deployment mechanism remains under consultation and no force has stood up. On a smaller institutional note, a military court released the singer-turned-militant Fadel Chaker on bail of roughly five thousand five hundred dollars while his case over 2013 clashes with the army remains open.

CRITICAL QUESTIONS

- ◆ Does the Zawtar al-Sharqiya and al-Gharbiya vacation execute within the announced days-long window with an actual Lebanese army entry, or does it join the postponed Zawtar al-Gharbiyeh and Froun vacation as an announced step that does not occur?
- ◆ Does the Bint Jbeil internal inquiry substantiate the competing account of the captured fighter's killing, and does either version alter Hezbollah's calculus on cross-border restraint?
- ◆ Does the contested LAF officer blacklist claim resurface with corroboration, or does it lapse as an unconfirmed single-source report?
- ◆ Does the France-Italy successor force move from preparation to a named deployment with a mandate before UNIFIL's mission winds down, or does the transition stall and leave the pilot zones without an agreed international backstop?

II. DOMESTIC POLITICAL LANDSCAPE

The presidency is now defending an implementation schedule rather than a signature, and the schedule is not yet a fact. Aoun confirmed his 21 July meeting with President Trump in Washington will proceed, while Israeli Ambassador Yechiel Leiter said Aoun will not meet Netanyahu and would leave the room if he found himself in it. Aoun said he is not fond of Israel but will proceed with the framework

absent another solution. He also said the framework, while not perfect, reflects the balance of power on the battlefield, and that Israeli occupation undermines the legitimacy of the state it prevents from deploying. He denied any rift between Lebanon's diplomatic and military negotiating tracks. He also denied that Washington vets Lebanese soldiers. That denial sits awkwardly against two other claims this week: Ambassador Leiter's claim that Israel proposed American vetting of the army to screen out Hezbollah sympathizers, and a separate report that Trump suggested Israel itself vet and train Lebanese soldiers. Secretary of State Rubio is reported to have pushed back on the second proposal.

Hezbollah's rejection hardened in language without moving into action. Secretary-General Qassem, speaking at a memorial event for Khamenei, called the framework a document not a single clause of which will pass, and said Hezbollah will be powerless to stop him from saying so. He also objected to the substitution of redeployment for withdrawal as language that implies continued Israeli control, cited the Nabatieh strikes as ceasefire violations, and called on the government to abandon the deal. The choice of platform is itself a signal. Hezbollah delivered its rejection of the Lebanese government's framework from inside Iran's mourning ceremony for its Supreme Leader, tying the group's domestic position to Tehran's at the exact moment Beirut is trying to demonstrate independence from that axis. The distance between the rhetoric and the conduct remains the finding. Hezbollah did not withdraw from government and did not call for street action beyond what has already been absorbed. The state's institutions continued to function despite the rejection.

Bassil occupies two positions that have not yet been forced to reconcile. On 8 July he praised southern Christian residents for holding the line across what he called the country's full ten thousand four hundred fifty-two square kilometers against Netanyahu's annexation claim, and called the framework a frightening scene that grants Israel cover to attack and occupy. A day later he said he wants the state alone to hold the negotiating mandate, wants weapons exclusive to the state, and wants Hezbollah's submission to it. He objects to Netanyahu using the framework as retroactive cover for strikes, warning that the decision now sits with Israel and Iran instead of Lebanon. The two statements together describe a position that wants sovereignty enforced against both occupier and non-state actor at once. The framework's own mechanics make that difficult: an Israeli withdrawal is conditioned on a disarmament the state has shown no capacity to compel.

Government ministers put the first concrete price on this war's damage and continued the sovereignty argument over who negotiates and who deploys. Information Minister Morcos put preliminary direct material damage from the current war at three to four billion dollars, a ministerial estimate that excludes indirect economic losses and stands apart from the World Bank's earlier and larger reconstruction-needs figure for the prior conflict window. The government continues drafting a return and reconstruction plan under Prime Minister Salam's instruction, covering repair grants, rental support, and temporary shelter. A visiting British deputy national security adviser reaffirmed London's commitment to Lebanese security and sovereignty over a two-day visit, a gesture of continued Western attention that carries no operational content of its own. Separately, Lebanon is conditioning its attendance at the Rome talks, scheduled for 15 and 16 July, on a prior Israeli withdrawal from the named pilot zones. That negotiating position makes physical performance the precondition for further talks. Beirut appears to have adopted it without being consulted on the Washington-to-Rome venue change itself, which reached the delegation through Israel's own announcement before Lebanon's own channels confirmed it.

Speaker Berri's threatened parliamentary blockade produced no test this week. No cabinet or parliamentary vote on the framework occurred, and the record carries no new confirming or disconfirming action on Berri's vow to collide with any attempt to ratify it. The blockade remains a standing threat. It has not yet been exercised as a veto, and its resolution stays open for the next adjudication window.

CRITICAL QUESTIONS

- ◆ Does Berri's blockade reach an actual parliamentary or cabinet test in the coming weeks, or does it continue to hold implementation in abeyance without ever forcing a vote?
- ◆ Does the American vetting dispute, Leiter's claim against Aoun's denial, surface a documented mechanism, or does it stay a contested single-source claim that neither government confirms?
- ◆ Does Lebanon's conditioning of Rome attendance on the pilot-zone withdrawal hold as real pressure, or does Beirut attend regardless if Israel misses the announced timeline?
- ◆ Does the three-to-four-billion-dollar damage estimate anchor a financing request Washington or the Gulf states answer, or does it remain an unfunded ministerial figure?

III. DOMESTIC SECTARIAN LANDSCAPE

A rare cross-sectarian convergence formed around rejecting Israel's annexation claim, led from both a Shia and a Christian pole. Fifteen municipalities across the Christian border villages, including Debel, Qlayaa, and Rmeish, publicly and uniformly denied Prime Minister Netanyahu's claim that some of their communities sought annexation to Israel. Debel's mayor said the town has the Lebanese state and will remain Lebanese. Qlayaa's mayor said his town had met every Israeli demand only to deny Israel a pretext for entry, adding that he wants neither the Israelis nor Hezbollah in his town and would rather they fight each other elsewhere. Speaker Berri and Jebran Bassil, occupying opposite ends of Lebanon's confessional spectrum, both amplified the villages' rejection, a convergence that crosses the sectarian line the framework and the occupation otherwise run along. The convergence is narrow. It protects the border communities' own account of themselves rather than endorsing any party's framework position. But it is a genuine cross-confessional alignment worth tracking as a stabilizing thread independent of the framework fight.

A Christian-Druze dispute opened this week over how to frame Lebanon's historical relationship to Israel. Lebanese Forces leader Samir Geagea addressed Druze leader Walid Jumblatt directly, arguing that history does not move backward, and that Lebanon allowed the 1949 Armistice Agreement with Israel to collapse and be trampled from 1964 onward. The dispute concerns the legitimacy and present relevance of that armistice as a frame for Lebanon's options today. It is a genuinely political disagreement between two communities' leaderships. Jumblatt has not directly rebutted Geagea this week.

The Shia community absorbed a hardened rejection delivered from a foreign platform while its displacement burden continued to ease at the margin. Qassem's framework rejection, delivered at a Khamenei memorial event, and Hassan Fadlallah's accusation that the government's silence on the annexation claim grants Israel legitimacy, both continue lines the community's political leadership has held since the signature. Beneath the rejection, returns to the south continued, and the shelter caseload fell further this week. That material easing works against the argument that the community's only recourse is to hold the weapons until a real withdrawal arrives, even as the hardest cases inside the occupied strip remain foreclosed.

Coverage of Sunni community political positioning was thin this week. Reporting this week carries no

distinct Sunni-community statement or internal development beyond the institutional continuity of the Salam government itself. That more plausibly reflects a quiet week for the community's politics than a structural gap. A silent community in a given week is itself a finding.

CRITICAL QUESTIONS

- ◆ Does the cross-sectarian rejection of the annexation claim by Berri and Bassil extend into any joint action, or does it remain two parallel statements that never combine into coordination?
- ◆ Does Jumblatt answer Geagea's challenge on the Armistice Agreement's relevance, and does his answer move him back toward the opposition front he swung away from last month?
- ◆ Does the partial return continue to erode the Shia bloc's cohesion around holding the weapons, or does Hezbollah convert the null-and-void line into renewed mobilization once the return rate slows?
- ◆ Does a distinct Sunni-community position on the framework surface in the coming weeks, or does the community's institutional weight continue to run entirely through the Salam government without a separate voice?

IV. DIPLOMATIC & REGIONAL VECTORS

The framework's next test moved from Washington to Rome on short notice, and Lebanon is negotiating its attendance rather than assuming it. Israel announced the venue change from Washington to Rome through Ambassador Leiter and then Foreign Minister Sa'ar, and Lebanon's delegation was reportedly not informed until the following morning, learning of the shift through Israel's own announcement ahead of its own channels. The State Department described the framework's signature as the end of one phase and the beginning of a new one. A Western diplomat characterized the 15 and 16 July session as a working meeting for operational logistics, covering what the pilot zones will entail, what the initial actions will be, and what is expected of each party. Lebanon has conditioned its attendance on a prior Israeli withdrawal from the named pilot zones. A Lebanese diplomatic source suggested Israel accepted the Rome venue quickly as a way to reduce the pressure Washington had applied during the Washington-based talks. That motive is assessed and remains unconfirmed.

Washington's own template for Lebanon remains the file it has made the least progress on. Lebanon remains the stalled file among the three the American envoy's regional template is working. Beirut answered the mid-2025 proposal with a seven-page counter-document, and nothing has moved since. The American position itself concedes Lebanon is unlikely to disarm Hezbollah by force, and operates on a voluntary basis that carries no consequence, no threat, and no whip. This week's announced implementation stage, the delegation, the named zone, the within-days language, is a step inside that voluntary template. It remains true, as of Friday, that no coercive instrument, no conditioned aid tranche, and no dated deliverable tied to Hezbollah's disarmament has attached to the Lebanon file. President Trump's earlier proposal that Syria take responsibility for Hezbollah instead of Israel has not recurred publicly this week, and has not been formally withdrawn. Syria's Foreign Minister Shaibani visited Beirut last month and told Aoun and Berri that Damascus has no intention of military intervention in Lebanon

despite American pressure. That reads as Syria's calibrated answer to a proposal Damascus has not been asked to confirm or deny again this week.

The Lebanon file is now explicitly coupled to a regional war that has resumed in earnest. The United States and Iran resumed direct strikes on 8 and 9 July after Iranian attacks on tankers in the Strait of Hormuz, including a Qatari liquefied natural gas carrier and a Saudi crude tanker. American strikes hit more than eighty targets on Wednesday and more than ninety on Thursday, including railway bridges struck for the first time since the earlier ceasefire. Iran's health ministry recorded at least fourteen killed and seventy-eight wounded over the two days, the first official overall count of that round. Iran retaliated against American bases in Bahrain, Kuwait, and Qatar, sounding air-raid sirens twice in Bahrain, home to the United States Fifth Fleet headquarters. President Trump declared the ceasefire memorandum over at the NATO summit in Ankara and revoked the sanctions waiver on Iranian oil exports. Iran's Foreign Minister Araghchi explicitly named Israel's ongoing conflict with Hezbollah in Lebanon as one of the factors that has rendered important and fundamental parts of the ceasefire understanding ineffective. That is a direct Iranian linkage of the Lebanon front to the wider war's collapse. Hezbollah's delegation, led by former minister Mohammed Fneish, and Hamas's delegation attended Khamenei's funeral proceedings in Tehran and met Foreign Minister Araghchi. Iranian state media framed the meeting as reaffirming support for Lebanon and a pledge to pursue an end to its war. That rhetoric has not yet translated into any observed change in Hezbollah's cross-border restraint.

Aoun broke from the axis this week to take an explicit position alongside the Gulf states against Iran. Aoun condemned Iran's strikes on Bahrain and Kuwait as a blatant violation of sovereignty and territorial integrity, and voiced Lebanon's full solidarity with the Gulf Cooperation Council. That is a notable and rare instance of Beirut taking a public position against Iran's regional conduct. The statement carries no operational content. Lebanon has no capacity to act on it. But it signals a presidency positioning itself with the Gulf states at the same moment it depends on Washington's goodwill for the framework's implementation, and on Iran's restraint for Hezbollah's continued non-engagement.

CRITICAL QUESTIONS

- ◆ Does the Rome session on 15 and 16 July produce an agreed operational sequence for the pilot zones, or does it stall on the same withdrawal-first precondition Lebanon has attached to its own attendance?
- ◆ Does Washington attach a coercive instrument, a conditioned aid tranche or dated deliverable, to the Lebanon file inside the coming weeks, or does the voluntary template continue to govern implementation?
- ◆ Does the wider US-Iran war's reabsorption of Washington's attention slow the newly announced Lebanon implementation track, or does the administration press ahead on Lebanon precisely to bank a visible result while the Iran front is active?
- ◆ Does Aoun's pro-Gulf statement draw any Iranian or Hezbollah response, or does it pass without consequence as a costless diplomatic signal?

V. HUMANITARIAN & INFRASTRUCTURE STRAIN

Return continued to outpace new displacement, and the shelter caseload kept falling. The International Organization for Migration put cumulative returns above six hundred forty thousand as of the first week of July. OCHA's Flash Update, dated to 2 July, recorded six hundred forty-six thousand one hundred seven returned nationwide against an estimated five hundred thousand still displaced, including forty-seven thousand one hundred forty-three people in four hundred thirty collective shelters. That is down from fifty-two thousand two hundred forty-three across four hundred seventy-nine sites the week before. Social Affairs Minister El Sayed put the southern-specific return figure at roughly four hundred thousand, with many still unable to return due to destruction or inaccessibility. The 2026 Flash Appeal remains thirty-seven percent funded as of the same OCHA snapshot. The trajectory shows a two-speed pattern. The shelter caseload is shrinking but real for the accessible districts. Return stays foreclosed for the towns inside the occupied strip or leveled outright.

UN agency reporting this week sharpened the funding picture more than the caseload itself. UNICEF's third situation report, covering a 31 May cutoff, put the 2026 Humanitarian Action for Children appeal at forty-nine percent funded against a three hundred eighty-eight million five hundred thousand dollar requirement. Water interventions reached one hundred sixty-seven thousand people, and primary healthcare units reached nineteen thousand three hundred ninety-one women and children in May alone. UNFPA's situation report, spanning 23 June to 7 July, reported reaching more than one hundred fifty thousand displaced people with reproductive health and gender-based-violence services, through fifty-five facilities, nine mobile medical units, and twenty-four mobile protection teams. That is against a revised twenty-five-million-dollar appeal that stands at only sixteen percent funded, the sharpest funding gap surfaced across any agency this week.

A human-rights organization called this week for investigation into strikes killing two dozen civilians earlier in the war. Amnesty International said three Israeli airstrikes on Tyre, Nabatieh, and Erkey in early March killed twenty-four civilians, twelve of them children. It said the evidence gives reasonable basis to conclude Israeli forces violated international humanitarian law on distinction and precaution, drawing on fifteen interviews with survivors, relatives, paramedics, and local officials. Separately, Israeli command-and-control supplier Elbit Systems disclosed at a London arms conference that its targeting system identified eight hundred fifty thousand targets across Gaza and Lebanon between October 2023 and the end of 2025. That is roughly one thousand potential targets a day in the wars' first two years. The context bears directly on the scale of the targeting process the Amnesty findings scrutinize.

The macro and reconstruction-financing picture stayed largely unchanged this week, and the record is silent where it has been silent before. No fresher Banque du Liban reserve or foreign-exchange figure surfaced this week, a standing gap, not a new one. The Finance Ministry has not published quarterly public-debt data since the fourth quarter of 2022. Former central bank governor Riad Salameh's hearing over the transfer of three hundred thirty million dollars to a British Virgin Islands company was postponed after Salameh sued the presiding judge. A separate hearing on a complaint from the current governor is set for 30 July. The case continues to shadow the credibility of any reconstruction-financing push built on restored central-bank governance. The reconstruction cost estimates that do exist, the government's own preliminary three to four billion dollars for the current war and the World Bank's larger prior-conflict figure, describe different windows and should not be added together.

The Hormuz reignition is the standing energy risk to Lebanese fuel costs, and this week's record carries the mechanism without a Lebanon-specific figure to attach to it. Iran's tanker attacks and the resumed American strikes pushed Brent crude up five point three percent to seventy-eight dollars

and nine cents, and West Texas Intermediate up five point four percent to seventy-four dollars and twenty-three cents. That reverses the relief the leased post-ceasefire pricing window had supplied. No Lebanon-specific pump or generator price data surfaced this week to confirm whether the transmission has yet reached household costs. That gap needs closing before the risk itself can be dismissed. A sustained Hormuz disruption reprices imported fuel before it reprices anything else in the Lebanese economy. A fuel-cost spike is the fastest route from a Gulf shock to a Lebanese political one.

CRITICAL QUESTIONS

- ◆ Does the shelter caseload continue its decline toward the low forty thousands, or does a demolition surge or a closed corridor reverse the trend back toward net displacement?
- ◆ Does the sixteen percent-funded UNFPA appeal see any correction, or does the reproductive-health and gender-based-violence gap widen further into the third quarter?
- ◆ Does the Hormuz-driven crude spike reach Lebanese pump and generator prices inside the coming weeks, and by how much?
- ◆ Does the Salameh case's 30 July hearing proceed, or does it face a second postponement that further stalls any reconstruction-financing case built on central-bank accountability?

VI. INDICATORS & WARNINGS

Military Indicators

- The Zawtar al-Sharqiya and al-Gharbiya vacation executes on the announced within-days timeline with a Lebanese army entry, the first physical test of the implementation-stage announcement.
- A second deliberate Israeli strike on uniformed Lebanese army personnel fires, ending the run of consecutive windows without one since the killing of Brigadier General Sabra.
- Hezbollah fire crosses onto Israeli soil for the first time since the framework's signature, re-internationalizing the war.
- The Bint Jbeil internal Israeli inquiry substantiates the competing account of the captured fighter's killing.
- The France-Italy successor force names a mandate and a deployment date ahead of UNIFIL's mission wind-down.

Political Indicators

- Berri's blockade reaches an actual cabinet or parliamentary vote on the framework or its mandate.
- Washington attaches a coercive instrument, a conditioned aid tranche or a dated deliverable, to the Lebanon file, departing from the voluntary template.
- The American vetting dispute produces a documented mechanism confirming either Leiter's claim or Aoun's denial.

- Lebanon attends the Rome talks despite the pilot-zone withdrawal not having occurred, signaling the conditionality was posturing, not a firm precondition.

Sectarian Indicators

- Jumblatt answers Geagea's challenge on the 1949 Armistice Agreement, and the answer signals whether his accommodation with the framework holds.
- The Berri-Bassil cross-sectarian rejection of the annexation claim extends into any joint or coordinated action.
- A distinct Sunni-community statement on the framework surfaces, closing this week's coverage gap.
- Hezbollah converts the null-and-void line into renewed street mobilization as the return rate slows.

Diplomatic Indicators

- The Rome talks on 15 and 16 July produce an agreed operational sequence for the pilot zones, or stall on Lebanon's withdrawal-first precondition.
- Iran's Araghchi or another senior official repeats the explicit linkage of the Lebanon front to the wider ceasefire's collapse, hardening the coupling.
- Trump's Syria-take-responsibility proposal recurs and forces a second Damascus disavowal.
- Aoun's condemnation of Iran's Gulf strikes draws an Iranian or Hezbollah response.

Humanitarian Indicators

- A Hormuz-driven crude spike registers in Lebanese pump or generator prices.
- The UNFPA appeal's sixteen percent funding level moves in either direction.
- The Salameh hearing proceeds on 30 July or faces a second postponement.

WEEK-AHEAD STRATEGIC WARNING

The most consequential test of the next seven days is whether the announced Zawtar al-Sharqiya and al-Gharbiya vacation becomes an observed fact, or joins the postponed Zawtar al-Gharbiyah and Froun vacation as an announcement without a follow-through. Washington has staked its own credibility on a within-days timeline and a dispatched delegation. Israel's defense minister spent the same week publicly rejecting the American president's framing of that timeline as a genuine withdrawal. If the vacation executes with an actual Lebanese army entry, the record moves meaningfully toward Scenario B, and the framework acquires its first performed provision since the signature. If it slips, the pattern from the prior pilot zone repeats. The framework's implementation stage becomes indistinguishable from its signature stage. A second postponement would harden the codified stalemate instead of testing it. The second convergence risk runs through the region more than through Lebanon itself. The reignited US-Iran war is drawing American attention at the precise moment Washington announced it would accelerate the Lebanon file. Iran has now named the Lebanon front explicitly as a reason its own understanding with Washington collapsed. That coupling could cut either way. It

could harden Tehran's incentive to keep the southern front simmering as a pressure point, or sharpen Washington's incentive to bank a visible Lebanon result while its attention is otherwise consumed. The quieter risk beneath both is the ground campaign's own continuity. Two civilians were killed in a strike two days after four died in the same town. A Radwan operative was captured, and a contested killing remains under internal inquiry. Together they describe a front that has not paused for any of the diplomacy above it. A single mass-casualty strike, or a Hezbollah shot across the border, would detonate the framework faster than any diplomatic failure could.

CRITICAL QUESTIONS

- ◆ Does the pilot-zone vacation execute this week, converting the announcement into the first performed provision of the framework?
- ◆ Does the reignited regional war accelerate or delay the Lebanon implementation track Washington just announced?
- ◆ Does the ground campaign's continued civilian toll force a diplomatic response that the framework's text alone has not?

VII. SCENARIOS & RISK ANALYSIS

These scenarios are overlapping layers of one reality, not a partition. They can co-occur. Each carries its own falsifiable trigger, and the bands deliberately sum above one hundred percent. Two variables govern them this week: whether the announced pilot-zone vacation converts into an observed Israeli withdrawal with army entry, and whether the reignited regional war accelerates or slows the diplomatic track that produced the announcement.

Scenario A: The Codified Stalemate, Now Under Test

MOST PROBABLE · 45–60%

The framework remains a document that neither side has performed against, even as it acquires an implementation schedule. Israel continues the lower-tempo campaign. The pilot-zone announcement slips, or produces only a partial, unverified vacation. Berri's bloc denies the framework a parliamentary path without collapsing the cabinet. Hezbollah continues to reject ratification from inside the government. The drivers are Katz's repeated public rejection of Trump's withdrawal framing, the voluntary American template that still carries no coercive instrument, and a Speaker's blockade calibrated to pressure the process without rupturing it. The announced schedule is a genuine change in the record, a concrete near-term test that did not exist seven days ago. It has not yet produced a fact. Probability assessment: most probable, 45 to 60 percent within the fourteen-day horizon. Breaking condition: an executed vacation with Lebanese army entry moves weight decisively to Scenario B, a mass-casualty strike or a cross-border shot moves it to Scenario C, and a ministerial withdrawal or a forced vote moves it to Scenario D.

Scenario B: Graduated Withdrawal Begins

Unlikely, rising · 18–30%

Israel executes the announced Zawtar al-Sharqiya and al-Gharbiya vacation on the within-days timeline. The Lebanese army deploys into and clears the zone. The framework's withdrawal clause starts to operate under the combined weight of the American delegation, the Rome talks, and the French-Italian successor force. The evidence for the scenario is the most concrete it has carried since the signature: a named zone, a dispatched delegation, and an announced timeline measured in days. The evidence against it is still substantial. Katz rejected the very withdrawal framing that would make this scenario real within a day of Trump's statement, and the prior pilot zone was announced and then postponed once already. Probability assessment: unlikely but rising, 18 to 30 percent within the horizon. The concrete scheduling evidence lifts the odds, short of the full revision the actual vacation with army entry would trigger. Revision condition fixed in advance: an executed vacation with confirmed army entry forces this band to the majority position immediately, and a second Israeli postponement or another Katz restatement of the indefinite hold collapses it back toward 10 percent.

Scenario C: The South Reignites

Unlikely, rising · 22–35%

The southern front detonates the framework before it institutionalizes. The deadliest strike in weeks, at Nabatieh al-Fawqa, and the captured-and-contested Bint Jbeil engagement describe a front still capable of an escalation that outpaces the diplomacy. Iran's explicit linkage of the Lebanon front to the collapse of its own understanding with Washington raises the odds that Tehran tolerates or encourages a harder Hezbollah posture instead of restraining it. The mitigating factors are that Hezbollah has held its no-cross-border-fire discipline through every provocation to date, including this week's flag-raising over Ali al-Taher and the two-strike sequence at Nabatieh al-Fawqa. Both Washington and Beirut also have real incentive to protect the Rome talks from a front-line collapse. Probability assessment: unlikely but rising, 22 to 35 percent within the fourteen-day horizon. The sharpened regional coupling and the deadliest single strike this week lift the odds modestly. Breaking condition: a strike at or above the intensity of 20 June, or a Hezbollah shot across the border, either of which converts this scenario from contingency to countdown.

Scenario D: Constitutional Rupture

Unlikely · 18–28%

The blockade hardens into a state crisis. Berri's vow to deny the framework a parliamentary path meets an actual ratification attempt, a Hezbollah-aligned minister moves against the negotiating mandate, or a documented move against the army command materializes. The restraint held again this week. No forced vote occurred. No minister moved. Qassem's hardened rejection remained rhetorical continuity, delivered from a foreign platform. Probability assessment: unlikely, 18 to 28 percent within the horizon, essentially flat absent any new firing evidence. That rises toward 35 to 45 percent if the framework is forced to an actual vote or a documented move against the army command occurs. Breaking condition: a Hezbollah-aligned ministerial withdrawal, a parliamentary vote, or a confirmed move against the army commander.

Scenario E: Two-Speed Return and Foreclosed Strip**Roughly even · 30–45%**

The displacement picture continues to split between a resumed return for the accessible towns and a hardening permanence for the occupied belt. Returns climbed past six hundred forty thousand, and the shelter caseload fell to just over forty-seven thousand people. Both readings are more favorable than the week before. The towns inside the Israeli-held strip, and the leveled villages of the demolition campaign, stay foreclosed by the same method that is consolidating the buffer behind the Yellow Line. Probability assessment: roughly even, 30 to 45 percent within the horizon. The continued and slightly accelerated return lowers the band, held above even by the strip's continued foreclosure. Breaking condition: a demolition surge or a closed corridor that reverses the aggregate return raises the band, and an executed Scenario B withdrawal that reopens contested ground lowers it.

The decisive variable for the next seven days is whether the announced pilot-zone vacation produces an observed Israeli withdrawal with Lebanese army entry, or joins the framework's growing list of announced steps that do not occur. An executed vacation pulls the field decisively toward Scenario B and gives the framework its first performed provision. A second postponement, following the Zawtar al-Gharbiyah and Froun precedent, locks Scenario A's stalemate in place with a harder edge, since an implementation stage that produces nothing is a worse signal than a stalemate that never promised anything. A mass-casualty strike or a Hezbollah cross-border shot, made more likely by Iran's explicit coupling of the Lebanon front to its own collapsed understanding with Washington, would put Scenario C's countdown into motion ahead of either outcome above. The single observable that resolves the most this week is whether an Israeli unit actually leaves Zawtar al-Sharqiya and al-Gharbiya and a Lebanese army unit actually enters it.



CORE GROUP

ABOUT CORE GROUP

Core Group is a Beirut-based strategic foresight house. We produce decision-ready analysis and advisory for governments, diplomatic institutions, and strategic investors navigating Middle Eastern complexity. Our work integrates structured analytical products, applied strategic advisory, and analysis-informed mediation; delivered on daily and weekly cycles calibrated to the speed at which the situation changes.

We are based in Beirut. In environments where official data is systematically unreliable and remote analysis inherits every distortion in its source material, physical proximity is not a logistical convenience but an epistemological foundation of our methodology. We verify what others can only estimate.

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