
WEEKLY STRATEGIC ASSESSMENT

THE ESTIMATE

THE SITUATION IN LEBANON



CORE GROUP

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EXECUTIVE SUMMARY

Lebanon and Israel reached a United States-brokered framework agreement this week, and the document arrived already carrying the shape of its own failure to deliver. The trilateral text converts the 4 June truce and the 17 June Islamabad memorandum into a signed roadmap that ties an Israeli withdrawal to the disarmament of Hezbollah, sets pilot zones the army would be handed to clear, and restores the state's monopoly on arms as the endpoint. Within hours of the announcement Israel drained it of the one thing that would have made it a withdrawal. Katz declared the troops would stay in the security zones indefinitely and ordered the Lebanese army to clear Hezbollah from the Yellow Line to the Litani, Netanyahu committed to remain until Hezbollah disarms nationwide and said Iran's attempt to make an Israeli withdrawal part of its Washington track will not happen, and Israel postponed the pilot-zone vacation of Zawtar al-Gharbiyeh and Froun, telling Beirut the pullback would take time. A secret security annex ties the withdrawal to full disarmament and grants Israel operational freedom, and the army kept striking through the week. The framework is a signed occupation.

Last week's central judgment, consolidation by process as the most probable path at 50 to 65 percent, held and can now be graded against the record. The expectation was a framework that persists while no pilot zone moves from agreement in principle to a scheduled Israeli vacation, and an occupation hardening under a process label. The week confirmed it and sharpened it into a signature. The framework signed, Israel postponed the only named vacation on offer, and the sequencing deadlock that ran through the contested security annex is now a secret annex that ties the pullout to a disarmament the state will not compel. A pilot zone moving from principle to practice did not materialize, and Israel's own postponement collapsed that path toward the floor. The single correction runs the other way: the internal rupture under-fired. Berri branded the framework sedition, worse than the 1983 May 17 Agreement, and vowed a large parliamentary bloc would block it, and Hezbollah called it null and void, yet Hezbollah did not quit the government, did not take the street beyond a contained Beirut protest, and the army held. The rupture that loomed as a crisis is arriving as a constitutional blockade instead.

The campaign ran under the diplomacy at a lower tempo than the prior spike but with a qualitative turn. The cumulative war dead rose to 4,298 against 4,230 a week earlier, a fraction of the 20 June rate, but the ground war between the IDF and Hezbollah resumed after the signature: a Golani platoon commander was killed in the first Hezbollah clash since the agreement, an Israeli officer was killed and a soldier wounded days later, the IDF claimed the full Ali al-Taher ridge that Hezbollah disputes, and it demolished a Hezbollah tunnel complex at Majdal Zoun. The line has moved from whether the talks would convert the clause, answered no, to whether a signed framework the state cannot enforce and the resistance bloc will not ratify becomes a durable codified stalemate or breaks. The break would come at the table through a resumed exchange, or at home through the fight over the army command that Aoun's denial of a move against Haykal and Berri's warning both mark as the live internal seam.

The question this week is whether the signed framework becomes an implementable path to a phased Israeli withdrawal, or codifies the occupation as a permanent signed stalemate that the state cannot enforce, Israel will not honor, and Hezbollah's bloc will not ratify, and whether the internal contest stays a parliamentary blockade or breaks into a state crisis over the army command and the negotiating mandate.

CRITICAL QUESTIONS

- ◆ Does Israel convert the postponed Zawtar and Froun vacation into a scheduled handover with army entry, or does the secret security annex hold the pullout hostage to a disarmament the state will not force?
- ◆ Does Berri's vow to block the framework in parliament reach a constitutional test, or stay pressure that never comes to a vote while implementation dies quietly?
- ◆ Does the campaign against the army command, the Haykal dismissal rumor Aoun denied and Berri warned against, mark an opening move to reshape the army before it is asked to disarm Hezbollah?

I. MILITARY AND SECURITY THEATER

The signature reopened the direct IDF-Hezbollah ground fight that had cooled over the prior week. The framework announcement did not pause the campaign, it changed its character, converting a phase of airpower and demolition into renewed contact between the two forces on the contested high ground. A Golani platoon commander was killed in the first Hezbollah clash since the agreement, an Israeli officer was killed and a soldier wounded in a second engagement days later, and four IDF soldiers were wounded as the talks closed. The IDF claimed it had seized the entire Ali al-Taher ridge and cast it as a major setback for Hezbollah, an assessment Hezbollah rejected as propaganda while holding that the ground was unchanged, and it demolished a Hezbollah tunnel complex at Majdal Zoun that ran some two hundred meters and that it identified as a drone assembly and launch site. The capability read carried from last week is now tested on the ground: Israel can hold and expand the belt by force and pays a rising price in dead and wounded soldiers for the high ground north of the Yellow Line, and Hezbollah retains the local anti-armor and tunnel-based fight that makes each meter expensive without crossing the border that would re-internationalize the war.

The cumulative toll rose slowly and the tempo stayed below the prior spike. The war has killed 4,298 and wounded 12,196 since 2 March, roughly sixty-eight more dead than the 4,230 recorded a week earlier, a rate a fraction of the eighty-three-killed day of 20 June. The lower tempo is not restraint converted into a halt. Israeli forces demolished homes, bulldozed roads and orchards from the border to the Litani, and set checkpoints along the border zone, the Yellow Line, and the Litani through the week, with documented damage extending to heritage sites across the south, the demolition method that converts the seized belt into uninhabitable ground carried forward from last week. The intent read holds: consolidation of a depopulated buffer behind the Yellow Line rather than a drive north, with the no-time-limit hold Netanyahu and Katz restated this week supplying the declared purpose, now written into a secret security annex that grants Israel operational freedom inside the framework.

Katz assigned the Lebanese army the disarmament the framework requires and Israel will not perform. The defense minister's demand that the Lebanese army clear Hezbollah from the Yellow Line to the Litani states plainly the mechanism the framework encodes and the trap inside it. The document ties an Israeli withdrawal to a disarmament that only the Lebanese army can execute against Hezbollah on Lebanese ground, and Israel has made the army's action the precondition for its own. The army has the manpower to police the south but neither the force ratio nor the political mandate to disarm Hezbollah against its will, and it has in practice deployed behind Israeli advances rather than confront either party. The framework therefore names a deliverable the one institution able to perform it will not attempt, which is why Katz can demand it, Netanyahu can hold the belt against it, and the withdrawal

can stay indefinitely deferred without either side breaching the text.

A fourth consecutive fourteen-day window passed without a strike on army personnel, and the pressure moved to the army's command. No deliberate Israeli strike on uniformed Lebanese army personnel occurred this week, and the 6 June killing of Brigadier General Sabra has not been followed by a second such strike across four consecutive fourteen-day windows. The threat to the institution shifted from the airstrike to the chain of command. A rumor that Aoun intended to dismiss Army Commander Rodolphe Haykal and the security chiefs ran through the week, Aoun met Haykal, called the rumor unfounded, and defended the army against what he termed campaigns of doubt and slander, and Berri warned that any move against the army or its commander would not go unanswered. The convergence of an Israeli demand that the army disarm Hezbollah with a campaign against the commander who would have to order it is the week's sharpest new military-political seam, because the framework's implementation runs through an army that both the Israeli demand and the internal rumor are working to reshape before it acts.

CRITICAL QUESTIONS

- ◆ Does the resumed IDF-Hezbollah ground exchange escalate toward the 20 June intensity inside the implementation window, or hold the lower post-signature tempo of localized clashes?
- ◆ Does Israel schedule the postponed Zawtar and Froun vacation with army entry, or does the secret security annex convert the pilot zones into an indefinite deferral?
- ◆ Does Hezbollah hold its no-cross-border-fire restraint through the resumed ground fight and the tunnel demolitions, or does a mass-casualty engagement break it onto Israeli soil?
- ◆ Does the Haykal dismissal pressure convert into an actual move against the army command inside fourteen days, the move that would precede any attempt to reshape the army before it is tasked?

II. DOMESTIC POLITICAL LANDSCAPE

The presidency signed the framework and now defends a document that delivered a mandate and no withdrawal. Aoun cast the agreement as protecting Lebanon's rights judicially and on the ground, insisted the state did not surrender or compromise and negotiates as a sovereign, called it a first step to restoring sovereignty, and asked critics to await the negotiation's outcome before passing judgment. Salam framed it not as a peace treaty but as a guiding framework whose implementation should produce an Israeli withdrawal and the safe return of the displaced, held the line on the state's monopoly on arms while ruling out any confrontation with Hezbollah, refused what he called blackmail and threats of civil war, and warned that a strike on the army would be a second fitna. Foreign Minister Rajji called the state's negotiating track the sole and exclusive path to a full withdrawal and warned that parallel frameworks would only fragment Lebanon's position. The presidency's posture is coherent and exposed in the same terms as before: it claims ownership of a withdrawal the state cannot compel, and the week converted that claim from a negotiating demand into a signed obligation the counterpart has already refused to meet.

The external verdict on the framework names the missing instrument. Washington's own envoy has conceded the structural problem the framework cannot solve. The transactional template the United States runs across the region trades reconstruction, military aid, and access for exclusive state control of arms, and on the Lebanon file the envoy has stated plainly that Washington brings no consequence, no threat, and no whip, operating on a voluntary basis, and has called Lebanon a state unlikely to disarm Hezbollah by force. The framework is that voluntary template given a signature. It supplies a clear diplomatic vision and withholds the coercive instrument that would make Beirut execute against Hezbollah or make Israel withdraw, which is why the same external analysis that rates the agreement a genuine roadmap also judges it to lack a credible path to peaceful implementation. The signature did not add the missing instrument. It formalized its absence.

The Speaker moved the fight from rejection to constitutional blockade, and stopped short of rupture. Berri branded the framework sedition, cast it as worse than the aborted 1983 May 17 Agreement, told Salam to back out, and vowed that he and a large parliamentary bloc would collide with any attempt to pass it through the constitutional institutions, warning its drafters sought to ignite discord. He also professed surprise at the pilot zones, saying he had agreed with Aoun on districts, a sign the mechanism moved past the understanding the Speaker thought he held. This is last week's format fight hardened into a threat to deny the framework a parliamentary path, and it is calibrated. Berri paired the blockade with a warning against any move on the army and with his standing role in averting civil strife, which Aoun publicly credited. The Speaker is positioning to make the framework unratifiable without making the state ungovernable, the blockade as pressure rather than the ministerial withdrawal that would collapse the cabinet.

Hezbollah rejected the framework in the strongest terms and kept its stake inside the state. Qassem called the agreement a grave blunder, deemed it null and void as a violation of the constitution and the National Pact, demanded Israel leave unconditionally, and warned that the authorities cannot oppose more than half the Lebanese and expect the country to function, the clearest signal yet that the group is laying political groundwork against a state that moves decisively against it. Yet the group signaled it would not quit the government or resort to street action, and the protest that reached Beirut stayed contained while the army vowed to keep the peace. The distance between the rhetoric and the conduct is the finding. Hezbollah has priced an open break with the state as more costly than a signed framework it can refuse to ratify and Israel will not implement, and it is contesting the agreement through the institutions and the Speaker's blockade rather than through the withdrawal from government that would trigger the rupture outright.

CRITICAL QUESTIONS

- ◆ Does Berri's blockade reach an actual constitutional test, a cabinet or parliamentary vote on the framework or its mandate, or does it hold implementation in abeyance without ever forcing the question?
- ◆ Does any Hezbollah-aligned minister move against the negotiating mandate inside fourteen days, the threshold that would convert the blockade into a state crisis?
- ◆ Does Washington attach a coercive instrument to the Lebanon file, a conditioned aid tranche or a dated deliverable, or does the voluntary template hold and leave the framework unenforceable?
- ◆ Does the presidency convert any single framework provision into an observed Israeli action,

or does the document stay a signed obligation with no performance on either side?

III. DOMESTIC SECTARIAN LANDSCAPE

The framework realigned the confessional map around the army rather than around the deal. The week's defining internal move was not a sectarian break over the agreement but a cross-confessional convergence on protecting the military. Bassil met Berri and the two agreed to fight strife and support the army, a Free Patriotic Movement and Amal alignment that forms a Christian-Shia axis around the institution at the exact moment the framework would ask it to disarm Hezbollah and a rumor campaign targets its commander. The alignment is narrow and telling: it protects the army without endorsing the framework, a coalition of those who want the institution shielded whether they back the deal or oppose it. Against it, the framework split the Christian camp on the agreement itself, with Geagea welcoming it as having shattered Hezbollah's narrative while the FPM channel ran toward Berri's caution. The sectarian contest this week is less over the deal than over who controls and protects the army that the deal makes the decisive instrument.

The Druze leadership swung from opposition toward accommodation inside the week. Jumblatt opened by blasting the negotiators, Aoun, and Salam for ignoring the Armistice Agreement, then closed the week saying he would not be part of any coalition against the framework. The reversal is the sharpest single-actor movement of the week and it favors the presidency's posture. It removes a potential Druze weight from Berri's blockade and signals that the confessional leaderships outside the Shia bloc are settling toward acquiescence in a signed framework rather than joining a front to overturn it, even where they distrust its terms. The community's swing matters most if the framework reaches the cabinet, where a Druze bloc aligned against the blockade strengthens the mandate the presidency holds.

The Shia community absorbed a signed framework its leadership calls surrender while its displacement burden eased at the margin. Hezbollah and Amal carried a rejection of the agreement into a community whose southern towns the campaign has leveled, and the intra-bloc line held between Qassem's null-and-void and Berri's constitutional blockade, two routes to the same refusal rather than the Fadlallah-Berri substance split visible a week earlier. The displacement burden that concentrates on the Shia south eased this week as returns resumed, roughly forty percent of the displaced now home and the shelter caseload falling, which loosens by a degree the community's strongest internal argument for keeping the weapons until the withdrawal is real, even as the occupied strip and the leveled villages foreclose return for the hardest cases. The seam to watch is whether the partial return and the signed framework together erode the bloc's cohesion, or whether Hezbollah converts the null-and-void position and the Speaker's blockade into a sustained mobilization that hardens it.

The Sunni establishment held with the state and the sovereigntist welcome came from the Christian right. Salam's government and the presidency carried the Sunni institutional weight into the framework's defense, the community's stake anchored in the state-rebuilding course the agreement claims to advance. The clearest endorsement came from Geagea, who read the framework as a strategic defeat for Hezbollah's narrative, the sovereigntist camp treating a signed document that names disarmament as a gain regardless of whether it delivers a withdrawal. The alignment fight that ran through the Aoun-Tehran thaw last week sits underneath the surface consensus, unvoiced while the framework holds the field, and the sovereigntist camp's willingness to bank the disarmament language against the absent withdrawal is the positioning to watch as implementation stalls.

CRITICAL QUESTIONS

- ◆ Does the Bassil-Berri protect-the-army axis hold as a cross-confessional bloc, or fracture when the framework forces a choice between shielding the institution and endorsing the deal?
- ◆ Does Jumblatt's swing toward accommodation hold through a cabinet phase, or reverse if the framework's terms sharpen against the Druze reading of the Armistice?
- ◆ Does the partial return and the signed framework erode the Shia bloc's cohesion, or does Hezbollah convert the null-and-void line into a sustained mobilization?
- ◆ Does the Christian sovereigntist camp break its silence on the Aoun-Tehran thaw, or hold the framework-as-victory line while the withdrawal fails to arrive?

IV. DIPLOMATIC AND REGIONAL VECTORS

The framework's international scaffolding shifted from UNIFIL to a European force even as its implementation stalled. The week's structural diplomatic development was the move to replace the United Nations peacekeeping mission with a European-led force. France and Italy signaled they would form a multinational coalition to succeed UNIFIL, the Secretary-General pushed with French backing to stand up a new arrangement in the south, and Paris and Rome indicated they would deploy after the mission departs, while UNIFIL reported movement restrictions across the southern sector. The transition matters because the framework's success depends on who polices the belt Israel holds and the zones the army is meant to enter, and a European force with national stakes carries a different enforcement posture than the UN mission it would replace. The shift is a bet that a harder international presence can supply on the ground what the framework text cannot, and it is unresolved: no force is deployed, no mandate is set, and the transition runs against an Israeli occupation that has restricted the peacekeepers already there.

Washington's break with Israel stayed rhetorical and its instruments turned to Hezbollah's finances. The administration's internal split over Lebanon persisted, the vice president faulting Israel's operations for angering Tehran and complicating the negotiations while the secretary of state defended the campaign and held the lead on the framework. The break produced no observable halt of the southern campaign, which ran through the week. Where American instruments did move, they moved against Hezbollah's money: Washington and the Gulf sanctioned Hezbollah financial institutions and senior officials, and Israel sanctioned IRGC-linked crypto accounts funneling millions to the group and its proxies. The financial squeeze is the coercion the withdrawal file lacks, aimed at the resource base rather than the occupation, and it fits the template the envoy described, an economic campaign against Hezbollah's shadow economy running alongside a voluntary disarmament track that carries no whip for either Beirut or Tel Aviv.

Trump's proposal that Syria confront Hezbollah cut across the state track, and Damascus moved to cool it. The president's floated idea that Syria rather than Israel should take care of Hezbollah, repeated since the Group of Seven summit, undercut the framework's premise that the Lebanese state disarms the group, signaling to Beirut that the state track can be bypassed, and it drew uniform regional rejection, with former American envoys calling it preposterous and Israel objecting to any role for the Islamist-led

Damascus government. Syria answered by lowering the temperature rather than raising it. The Syrian foreign minister visited Beirut, met Aoun and Berri, reassured the leadership, and said Damascus was open to meeting Hezbollah if interests required, and the two states formed a joint ministerial committee on security and economic files. The proposal's effect stayed diplomatic and destabilizing rather than kinetic, a cross-pressure on the framework that moved no Syrian unit while it weakened the very state track Washington's own envoy runs.

The Gulf reopened toward Lebanon while Iran pressed the coupling and the leased energy relief held.

The United Arab Emirates lifted its travel ban for Emiratis to Lebanon and Abu Dhabi discussed consolidating Lebanese security with Aoun, the week's first concrete Gulf reopening signal and a lever the presidency can present as the reconstruction and investment the framework's economic half promises. Iran worked the other side, Ghalibaf casting the end of the Lebanon war as important as the end of the Iran war and Tehran signaling through the Speaker that it continues its efforts, the coupling that binds the Lebanon withdrawal to Iran's Washington track against the decoupling Beirut, the Gulf, and Washington assert. The energy relief that reaches Lebanese fuel costs held, crude near its post-war lows, but it stayed leased: Iran can resume Hormuz transit fees as early as mid-August once the free-passage window lapses, and Oman's public opposition to those fees is the only external brake on the toll regime that would reprice Lebanese imports. No strike hit a Gulf capital this week, so the Gulf-as-target axis stayed quiet, and the live maritime risk remains the post-window Hormuz toll rather than a kinetic shock.

CRITICAL QUESTIONS

- ◆ Does the France-Italy force move from signal to a named deployment with a mandate, or does the UNIFIL transition stall and leave the belt policed by the occupier alone?
- ◆ Does the US-Gulf financial squeeze on Hezbollah convert into observable pressure on the group's posture, or does it harden the null-and-void rejection without moving the arms question?
- ◆ Does the Trump-Syria proposal recur and force a second Damascus disavowal, or does the Syria-Lebanon joint committee institutionalize the de-escalation?
- ◆ Does the Hormuz free-transit window lapse into a toll regime that reprices Lebanese fuel before mid-August, or does Omani opposition hold the leased relief?

V. HUMANITARIAN AND INFRASTRUCTURE STRAIN

Return resumed for the accessible caseload while the occupied strip and the leveled villages foreclosed it for the rest. The displacement picture split into two speeds this week. Roughly forty percent of those displaced during the war, on the order of four hundred thousand people, have returned, and the collective-shelter caseload fell to 52,243 people in 479 sites as of 29 June, down some 7,500 people and 46 shelters in four days as limited returns resumed in South and Nabatieh governorates. Against that easing, the return corridor is closed for the hardest cases, the tens of thousands whose towns sit inside the Israeli-held belt, were leveled, or both, and the demolition and checkpoint pattern the campaign ran through the week works to keep them out. The humanitarian trajectory is therefore no longer uniform entrenchment. It is a partial return for the reachable towns running against a hardening perma-

nence for the occupied strip, and the demolition method behind the second half is the same instrument that is consolidating the buffer behind the Yellow Line.

The medical and heritage attrition ran under the count and the food-security floor held at crisis. The war's documented dead reached 4,298 with bodies still recovered from areas the army had sealed, and the week's damage record widened to heritage sites across the south, the cultural and civilian destruction the structured casualty feed does not capture. A food-security assessment projected widespread crisis-level outcomes across Lebanon from mid-2026 into early 2027, the caseload sustained by insecurity and livelihood disruption rather than by a single shock, and the 2026 Flash Appeal stayed 37 percent funded at roughly 237 million dollars of the 640 million required. The southern medical system that the campaign pushed toward failure absorbed continued strikes and demolition in the Nabatieh and Bint Jbeil basins, the attrition of facilities and personnel running beneath the negotiating track that held the headlines.

The macro frame stayed stable on a price floor that has not come down with the war premium. The airport, the port, and the Syria crossings stayed operational, the lira held at 89,500 to the dollar, and the Banque du Liban balance sheet stayed stable with gold the anchor at roughly half the total. The household price floor did not follow crude down. Between February and May, gasoline rose about 39 percent, diesel about 62 percent, and private generator tariffs about 53 percent, and annual inflation ran near 20 percent into the spring, the war premium that rises fast in fuel-dependent costs and falls slowly persisting in bread, transport, and generator power even as the external oil shock unwound. The relief Lebanese importers see this month is leased to the Hormuz free-transit window, and a post-window toll regime is the standing energy risk that would reprice the fuel underneath the entire cost structure. A prospective Iraqi fuel-export route through Syria is a second channel to watch, a supply diversification that would matter if it reaches Lebanese terminals.

CRITICAL QUESTIONS

- ◆ Does the two-speed return hold, the accessible caseload going home while the occupied strip stays foreclosed, or does a demolition surge or a closed corridor reverse the aggregate back toward net displacement?
- ◆ Does a southern hospital in the Nabatieh or Bint Jbeil basin suspend operations under continued strikes, the system-failure threshold flagged last week?
- ◆ Does the Hormuz free-transit window lapse into a toll regime that lifts Lebanese pump and generator prices before the April premium unwinds?
- ◆ Does the crisis-level food-security projection convert into a measurable rise in shelter dependency or acute need in the returning districts, inside the horizon?

VI. INDICATORS AND WARNINGS

Military Indicators

- Israel schedules the postponed Zawtar and Froun vacation with Lebanese army entry, or the secret security annex holds the pilot zones in indefinite deferral.

- The resumed IDF-Hezbollah ground exchange escalates toward the 20 June intensity, or holds the lower post-signature tempo of localized clashes.
- Hezbollah fire crosses onto Israeli soil for the first time since the signature, re-internationalizing the war.
- A second deliberate Israeli strike on uniformed Lebanese army personnel fires inside fourteen days, after four consecutive windows without one since the killing of Brigadier General Sabra.
- A move against the army command materializes, a Haykal dismissal or a forced reshuffle of the security chiefs, the opening move of any attempt to reshape the army ahead of a disarmament tasking.

Political Indicators

- Berri's blockade reaches a constitutional test, a cabinet or parliamentary vote on the framework or its mandate, or holds implementation in abeyance without forcing the question.
- A Hezbollah-aligned minister moves against the negotiating mandate inside fourteen days, converting the blockade into a state crisis.
- Washington attaches a coercive instrument to the Lebanon file, a conditioned aid tranche or a dated deliverable, departing from the voluntary template.
- The presidency converts any single framework provision into an observed action by either party, or the document stays a signed obligation with no performance.

Sectarian Indicators

- The Bassil-Berri protect-the-army axis holds as a cross-confessional bloc, or fractures over the choice between shielding the institution and endorsing the deal.
- Jumblatt's swing toward accommodation holds through a cabinet phase, or reverses on the framework's terms.
- Hezbollah converts the null-and-void line into a sustained mobilization, or the partial return erodes the bloc's cohesion.
- A Bkerke or Lebanese Forces statement breaks the sovereigntist silence on the Aoun-Tehran thaw.

Diplomatic Indicators

- The France-Italy force moves from signal to a named deployment with a mandate, or the UNIFIL transition stalls.
- The US-Gulf financial squeeze on Hezbollah converts into observable pressure on the arms question, or hardens the rejection without moving it.
- The Trump-Syria proposal recurs and forces a second Damascus disavowal, or the Syria-Lebanon joint committee institutionalizes the de-escalation.
- The Hormuz free-transit window lapses into a toll regime that reprices Lebanese fuel before mid-August, or Omani opposition holds the leased relief.

Humanitarian Indicators

- A southern hospital suspends operations under continued strikes.
- Lebanese pump or generator prices move on the Hormuz standoff, in either direction.
- A demolition surge or a closed return corridor reverses the aggregate return back toward net displacement.

WEEK-AHEAD STRATEGIC WARNING

The most dangerous convergence of the next seven days runs through the gap between a signed framework and an absent withdrawal. The presidency holds a document that names a phased Israeli pullout tied to a disarmament the state cannot compel, and Israel has already postponed the only pilot-zone vacation on offer while ordering the Lebanese army to perform the disarmament in its place. Two failure modes press on that gap. The first is a resumed southern exchange: the ground fight between the IDF and Hezbollah reopened after the signature, and a clash that climbs toward the 20 June intensity or a Hezbollah shot across the border would convert the framework from unimplemented to dead and hand Tehran the pretext to walk on the coupled clause. The second is an internal fracture that runs not through a cabinet vote but through the army command, where an Israeli demand that the army disarm Hezbollah meets a domestic campaign against the commander who would have to order it, and a move against Haykal inside the window would signal an attempt to reshape the institution before it is tasked. The quieter danger underneath both is the codified stalemate itself, a signed occupation that neither side breaches because neither performs, the belt hardening behind the Yellow Line while the withdrawal waits on a disarmament no party will force. The decisive test of the week is whether Israel converts a postponed vacation into a scheduled handover, and whether the Speaker's blockade and the pressure on the army command stay short of rupture or cross it.

CRITICAL QUESTIONS

- ◆ Does Israel convert the postponed Zawtar and Froun vacation into a scheduled handover with army entry, the threshold that separates a withdrawal framework from a signed occupation?
- ◆ Does the resumed IDF-Hezbollah ground exchange or a Hezbollah cross-border shot detonate the framework before it institutionalizes?
- ◆ Does the fight over the army command break the state before the framework's terms do, the internal seam the Haykal rumor and Berri's warning both mark?

VII. SCENARIOS AND 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 signed framework produces an observed Israeli action toward withdrawal or stays a document neither side performs, and whether the internal contest over the framework and the army command stays a parliamentary blockade or breaks into a state crisis.

Scenario A: The Codified Stalemate

MOST PROBABLE · 55–70%

The framework is a signed document that neither side implements. Israel holds the belt behind the Yellow Line, keeps the postponed Zawtar and Froun vacation indefinitely deferred under the secret security annex, and continues the lower-tempo campaign, while the Lebanese army does not move against Hezbollah, Berri's bloc denies the framework a parliamentary path without collapsing the cabinet, and Hezbollah refuses ratification from inside the government. This is the straight-line extension of the week's record and every actor's demonstrated posture, and it requires no party to change course. The drivers are Israel's no-time-limit hold restated by Netanyahu and Katz and written into the annex, the voluntary US template that carries no coercive instrument for either Beirut or Tel Aviv, and a Speaker's blockade calibrated as pressure, not rupture. The implication is a signed occupation: the belt hardens, the withdrawal waits on a disarmament no party will force, and the displacement settles toward permanence for the occupied strip while the framework supplies the process label. Probability assessment: most probable, 55 to 70 percent within the fourteen-day horizon, the world as it stands at the close of the signing week. Breaking condition: a scheduled Israeli vacation of a named position moves weight to Scenario B, a talks-detonating strike or a cross-border shot moves it to Scenario C, and a ministerial withdrawal or a move on the army command moves it to Scenario D.

Scenario B: Graduated Withdrawal Begins

Unlikely · 12–22%

Israel converts the postponed pilot-zone vacation into practice, the IDF withdraws from Zawtar al-Gharbiyeh and Froun or a comparable named position, the Lebanese army deploys into and clears it, and the framework's withdrawal clause starts to operate under the combined Washington, Gulf, and European pressure. The evidence for the scenario is the framework itself as a concrete mechanism, the France-Italy force offered as the enforcement the text lacks, and the Gulf reopening the presidency can present as the economic half of the bargain. The evidence against it is heavier: Israel postponed the only vacation on offer and said the pullback would take time, wrote its operational freedom into a secret annex, and tied the withdrawal to a disarmament the state will not perform, while Washington's own envoy concedes the file carries no whip. Probability assessment: unlikely, 12 to 22 percent within the horizon, revised down from last week on Israel's explicit postponement. Live diplomatic channels rated below 30 percent are the calls most often under-priced, so the revision condition is fixed in advance: a scheduled Israeli vacation of a named position with army entry forces this band up immediately, and a second Israeli reaffirmation of the indefinite hold inside the horizon collapses it toward 8 percent.

Scenario C: The South Reignites

Unlikely · 20–32%, rising over the full window

The southern front collapses the framework before it institutionalizes. The resumed IDF-Hezbollah ground fight climbs toward the 20 June intensity, or a mass-casualty strike kills the agreement, or Hezbollah answers the tunnel demolitions and the seized ridge with fire across the border, or Tehran walks on the coupled Lebanon clause, and the theater returns to a wider exchange before the sixty-day clock runs out. The drivers are the direct contact reopened by the signature, the Golani-commander clash and the Majdal Zoun demolition as live friction, the structural contradiction between the framework's withdrawal clause and Israel's declared permanence, and the coupling Ghalibaf asserts. The mitigating factors are that Tehran and Washington have banked early wins they are reluctant to forfeit, crude is flowing and the markets have priced de-escalation, and Hezbollah has held its border restraint and kept its government seat through a week it called surrender. Probability assessment: unlikely, 20 to 32 percent within the fourteen-day horizon, rising over the full sixty-day window as the free-transit clause lapses and the unperformed framework ages. Breaking condition: a strike at the 20 June intensity or a Hezbollah cross-border shot inside the window, either of which converts this scenario from contingency to countdown.

Scenario D: Constitutional Rupture

Unlikely · 20–30%, rising if the framework reaches a vote

The blockade hardens into a state crisis. Berri's vow to deny the framework a parliamentary path meets an attempt to ratify it, a Hezbollah-aligned minister moves against the negotiating mandate, or the campaign against the army command converts into an actual move on Haykal, and the internal contest crosses from pressure to rupture. The drivers are a signed framework Hezbollah cannot concede and calls null and void, a Speaker positioning a large bloc to block it, and the convergence of an Israeli demand that the army disarm Hezbollah with a domestic effort to reshape the army's command before it acts. The restraint is heavy and it held this week: Hezbollah declined to quit the government or take the street, the Beirut protest stayed contained, the army vowed to keep the peace, Jumblatt swung away from the opposition front, and the Bassil-Berri axis converged on protecting the institution rather than breaking the state. Probability assessment: unlikely, 20 to 30 percent within the horizon, rising toward 35 to 45 percent if the framework is forced to a cabinet or parliamentary vote or a move on the army command materializes, the sequences that convert the blockade into a crisis. Breaking condition: a Hezbollah-aligned ministerial withdrawal, a vote on the framework, or a dismissal of the army commander.

Scenario E: Two-Speed Return and Foreclosed Strip

Roughly even · 35–50%

The displacement splits durably into a resumed return for the accessible towns and a hardening permanence for the occupied belt. Roughly forty percent of the displaced go home and the shelter caseload keeps falling in the reachable districts, while the tens of thousands whose towns sit inside the Israeli-held strip or were leveled stay foreclosed by the demolition and checkpoint pattern, and the southern medical system continues to attrit under strikes. The entrenchment risk is lower than last week's uniform read because return is measurably underway, and it persists because Israel has put a method behind

the no-return pattern in the belt it holds. Probability assessment: roughly even, 35 to 50 percent within the horizon for the two-speed outcome, the band lowered from last week by the aggregate return and held above even by the foreclosed strip. Breaking condition: a demolition surge or a closed return corridor that reverses the aggregate back toward net displacement raises the entrenchment band, and a scheduled withdrawal from Scenario B that reopens the belt lowers it.

The decisive variable for the next seven days is whether the signed framework produces a single observed Israeli action toward withdrawal, or stays a document neither side performs. A scheduled vacation of a named position pulls the field toward Scenario B and drains A. A framework that signs and yields nothing locks Scenario A's codified stalemate and arms Scenario D's internal sequence behind it. A resumed exchange at the 20 June intensity or a Hezbollah cross-border shot puts Scenario C's countdown on the sixty-day clock. The two observables that resolve it first are whether Israel converts the postponed Zawtar and Froun vacation into a scheduled handover, and whether the Speaker's blockade and the pressure on the army command stay short of rupture or cross 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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