
RESTRICTED DISTRIBUTION | STRATEGIC ANALYSIS

ONE MONTH OF WAR

Strategic Analysis Report



CORE GROUP

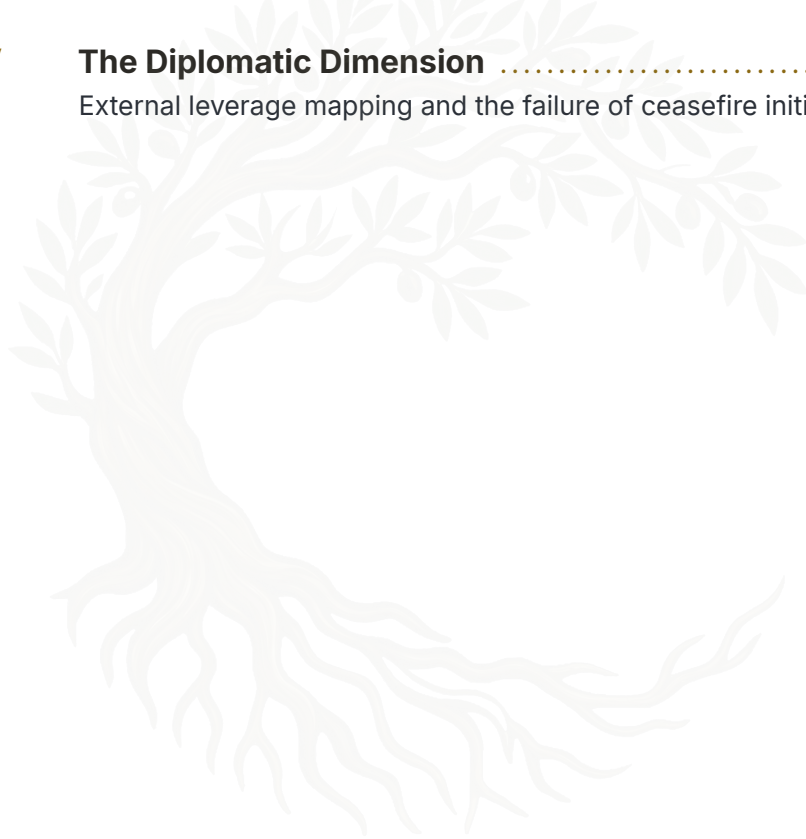
March 2026

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CONTENTS

SECTION I	Synthesis: Four Weeks of War	4
	Cross-dimensional analysis and conflict trajectories	
SECTION II	The Military Dimension	13
	IDF operational architecture and Hezbollah's tactical response	
SECTION III	The Humanitarian Dimension	24
	Displacement saturation, shelter collapse, and supply chain failure	
SECTION IV	The Political-Sectarian Dimension	36
	Sovereignty gaps, institutional vetoes, and economic erosion	
SECTION V	The Diplomatic Dimension	50
	External leverage mapping and the failure of ceasefire initiatives	



EXECUTIVE SUMMARY

Between March 2 and March 29, 2026, the war in Lebanon produced a set of **converging, irreversible realities** across four dimensions: military, humanitarian, political, and diplomatic. This binder presents an integrated strategic assessment of those four weeks, structured as a cross-dimensional synthesis followed by four standalone analytical reports.

Israel's military campaign created **territorial and demographic facts on the ground** faster than any Lebanese institution could respond and faster than any diplomatic framework could form. Six IDF divisions established a **buffer zone covering 60–70% of the Litani perimeter**, systematically demolishing Shia border villages under an explicit Gaza-derived operational doctrine. Over one million people were displaced; **87% remain outside the formal shelter system**, absorbed by host communities whose tolerance is hardening along sectarian lines week by week. The humanitarian infrastructure south of the Litani collapsed after the last hospital was seized and all six primary bridges were destroyed.

The Lebanese state responded with the most ambitious sovereignty offensive in its modern history: a constitutional ban on Hezbollah's military activities, the expulsion of the Iranian ambassador, a formal UNSC complaint, and a presidential pledge to confiscate all weapons. **None of these was enforced**. The LAF publicly refused to deploy against Hezbollah. Speaker Berri successfully vetoed the ambassador expulsion through extra-constitutional pressure. Hezbollah violated the weapons ban daily while **strategically choosing not to topple the government** during the war, deferring the domestic confrontation to the post-war period.

Diplomatically, **Lebanon was excluded from every active negotiation**. Five separate ceasefire initiatives failed for the same structural reason: the actors with leverage did not want a Lebanon-specific outcome on terms Lebanon could deliver, and Hezbollah's strategic decisions remained subordinated to Tehran. The US accepted Israel's position that **any US-Iran agreement will not apply to the Lebanese front**.

The most probable near-term trajectory is **frozen degradation**: the buffer zone consolidates, a low-intensity insurgency persists within it, displacement normalizes without resolution, the state survives in declaratory mode, and no diplomatic framework materializes. All four dimensions continue deteriorating simultaneously without catastrophic rupture. A **single additional shock event**, whether a mass displacement trigger, a fuel supply interruption, or a sectarian incident at a displacement center, could transition this trajectory into **cascade failure**.

This binder contains:

- **Section I: Strategic Synthesis** provides an integrated strategic outlook on the conflict's trajectory and cross-dimensional causal chains.
- **Section II: Military Dimension** documents operational realities, tactical developments, and the shifting institutional postures of armed actors.
- **Section III: Humanitarian Dimension** assesses the evolving landscape of displacement, infrastructure stability, and logistical constraints.
- **Section IV: Political-Sectarian-Economic Dimension** analyzes institutional integrity, sectarian fault lines, and the drivers of domestic economic erosion.
- **Section V: Diplomatic Dimension** maps the geopolitical landscape, regional deal architecture, and the limits of external leverage.

STRATEGIC ANALYSIS

LEBANON UNDER SIEGE

Four Weeks of War

March 2026

KEY JUDGMENTS

1. The first four weeks of conflict established that Lebanon's trajectory is being determined by the intersection of **Israeli military permanence and Lebanese institutional impotence**, and no actor, internal or external, has demonstrated either the capacity or the incentive to alter either condition.
2. The four dimensions of the conflict form a single interlocking system: the IDF's targeting choices produced a specific displacement pattern, which activated sectarian dynamics that confirmed to external actors the state cannot deliver, which **closed the diplomatic space that might have constrained the military campaign**.
3. **Gulf states are the most consequential external variable**: simultaneously absorbing the war's secondary costs, structurally excluding Lebanon from the regional deal architecture, and positioning for post-war reconstruction leverage. Their tolerance threshold is the condition most likely to shift the conflict's trajectory.
4. **The conflict's most probable near-term trajectory is frozen degradation**, all four dimensions deteriorating slowly without catastrophic rupture and without any actor taking decisive action.
5. The Lebanese state's sovereignty record (March 2 ban, ambassador expulsion, UNSC filing) and Hezbollah's operational record (99-attack days, SAM introduction, insurgency preparation) are both **positioning for a post-war contest that neither can currently win**.

CENTRAL QUESTION

What did the first four weeks of the Lebanon conflict establish across all four dimensions simultaneously, what dynamics are now in motion, and how does the conflict continue?

I. THE VERDICT

The first four weeks of war in Lebanon produced a single, integrated reality that no individual dimension fully captures alone. Israel's military campaign created physical and demographic facts on the ground faster than any Lebanese institution could respond and faster than any diplomatic framework could form.

The state attempted to match the military escalation with a parallel sovereignty escalation, each week producing more ambitious declarations, but these two escalation curves operated in different domains. **The military curve produced irreversible territorial realities:** six divisions committed across three axes, 60 to 70% of a continuous Litani buffer zone consolidated, 20 planned outposts, six primary Litani bridges destroyed, border villages systematically demolished. **The sovereignty curve produced an international legal record with no enforcement mechanism behind it:** the March 2 weapons ban that the LAF publicly refused to execute, the ambassador expulsion that the ambassador simply ignored, the UNSC filing that any enforcement resolution would meet with a US veto. By March 29, the gap between these two curves had become the defining structural condition of the conflict. Permanent facts on the ground. Permanent inability to reverse them through institutions.

This gap is not a failure of political will. It is the structural consequence of a conflict that absorbed Lebanon into a regional war whose primary axes, the US-Iran nuclear confrontation, Gulf energy security, and Israeli deterrence posture, **do not treat Lebanon as a principal.** The Islamabad Quadri-lateral convened four foreign ministers on March 29 to coordinate Hormuz shipping proposals to Washington. Lebanon was not represented. It was not invited. It did not appear in any confirmed deliverable. On the same day, Netanyahu ordered the expansion of the security buffer zone, without apparent US objection. **The diplomatic track and the military track operated independently of each other** throughout the four weeks, and the diplomatic activity of regional powers imposed no restraint on the territorial expansion occurring simultaneously in southern Lebanon.

Every internal Lebanese initiative was constitutionally creative, internationally legible, and operationally empty. Every external initiative failed for the same reason: the actors with leverage did not want a Lebanon-specific outcome on terms Lebanon could deliver, and the actor whose military consent was required for any ceasefire had subordinated its decision-making to Tehran on March 12. Iran demanded simultaneous cessation on all fronts including Lebanon. Washington rejected this at Israel's insistence. A senior Israeli official stated: "Lebanon does not matter to President Trump." The US accepted the position. **The single diplomatic exchange that could have altered Lebanon's trajectory was resolved against it.**

The severity of this integrated crisis is captured in a single indicator: over 189,000 people, half of them children, crossed from Lebanon into Syria by March 26. **People who survived Syria's civil war chose to return to a country they once fled rather than remain in Lebanon.** That decision, replicated 189,000 times in 24 days, is the most direct measure of what the first four weeks produced.

ANALYTICAL ASSESSMENT

The result is not a frozen conflict. It is a conflict whose military, humanitarian, political, and diplomatic dimensions are all in motion simultaneously, each driving the others forward, with no mechanism, internal or external, capable of arresting any of them.

II. THE FOUR WEEKS — A CROSS-DIMENSIONAL SYNTHESIS

This section is organized around the causal chains that cross dimensional boundaries. Each analytical finding traces how a development in one dimension caused or amplified a development in another.

A. Causal Chain 1: Targeting Logic → Demographic Reshaping → Sectarian Activation

The IDF's targeting calculus expanded across four concentric rings of Hezbollah's ecosystem: military infrastructure from day one, al-Qard al-Hassan financial branches on March 9 and 10, Islamic Health Authority social services from March 13, and the al-Amana fuel network and logistics infrastructure from March 24. Each ring widened what Israel treated as a legitimate military target. The combined effect was not merely the degradation of Hezbollah's military capacity. **It was the systematic dismantling of the institutional ecosystem that sustained everyday Shia civilian life:** savings, healthcare, fuel supply, media, education. The financial decapitation alone removed the primary savings mechanism and social safety net for hundreds of thousands of families in 48 hours. No government equivalent exists. No international institution has the architecture to replace it. The demolition of border villages, Katz's explicit invocation of the "Beit Hanoun and Rafah model," and evacuation orders covering 14% of Lebanese territory together produced a displacement pattern that was overwhelmingly Shia in origin and direction.

The formal shelter system absorbed only 13% of this displacement. The remaining 87%, over 870,000 people, fell outside institutional management entirely: dependent on host families, trapped in a rental market where prices surged up to 500%, or sleeping in vehicles, mosques, and open spaces. **This invisible majority is the humanitarian system's true vulnerability.** It is untracked, unserved, and generating friction at every point of contact with host communities.

That friction activated along every sectarian interface the displacement crossed. The pattern was structured and progressive: passive landlord screening in Week 1, explicit calls to limit hosting of displaced Shia families in Christian border villages during Week 2, violent clashes in Khalde and armed confrontation between displaced persons in Naccache during Week 3, and the Karantina "camp" framing in Week 4 that converted a shelter logistics discussion into a sectarian confrontation invoking the 1976 massacre. Community watch groups formed in Keserwan. **Landlords in Christian and Sunni areas vetted tenants for political affiliations** and refused anyone with suspected Hezbollah connections on the grounds that their buildings would become Israeli targets, creating soft sectarian segregation at the individual transaction level that concentrated displaced Shia families in zones simultaneously under bombardment.

The differential treatment of communities deepened this dynamic from the military side. Shia border villages received systematic demolition orders; Christian villages, Rmeish, Klaiaa, Alma Chaab, did not. The physical village erasure, the financial decapitation, the concentrated displacement, and the IDF's declared permanence together create a convergence that is **producing a de facto sectarian re-sorting of Lebanon's population.** It is the emergent consequence of a military targeting pattern concentrated on Shia areas, transmitted through the humanitarian system as concentrated displacement, and expressed through the social system as host community rejection. The displacement options available to Shia families narrowed from both directions: host communities hardened against them while the areas willing to absorb them were simultaneously under bombardment.

The sectarian activation, in turn, confirmed to external actors what they assessed about Lebanese state capacity. The state cannot manage the consequences of the war it did not start. Saudi Arabia watched. France took note. The Islamabad Quadrilateral assembled without Lebanon. The confirmation narrowed the diplomatic space further, reinforcing the structural exclusion of Lebanon from every active negotiation. **A military targeting logic produced a demographic reshaping that activated a sectarian dynamic that closed the diplomatic door that might have constrained the military campaign. The loop is complete.**

B. Causal Chain 2: Institutional Impotence → Enforcement Failure → Diplomatic Closure

The March 2 cabinet ban was constitutionally creative and strategically necessary. It gave the state international legitimacy and gave Shia ministers political cover to remain in the cabinet by grounding the prohibition in sovereignty rather than a terrorism designation. But it created an enforcement expectation that every subsequent week exposed as fiction. Hezbollah violated the ban within hours. The enforcement response amounted to 25 arrests for illegal weapons possession, none of them Hezbollah members, skeletal checkpoints, and two unexecuted arrest warrants. **The National Officers manifesto on March 12 publicly declared that the LAF would not enforce the ban**, warning that deploying against Hezbollah would fracture the institution along sectarian lines. Approximately 30% of LAF personnel are Shia. President Aoun calculated that a wartime change in command would cause institutional paralysis, and he sidelined discussions on removing the LAF Commander. The enforcement instrument had publicly refused to enforce.

The state's language escalated in ambition precisely as its capacity contracted. Week 2 produced the Justice Minister declaring "the resistance doctrine ended in 2000" and President Aoun pledging to "confiscate all weapons," the most explicit disarmament commitment by any Lebanese head of state since Hezbollah's founding. Week 4 produced the ambassador expulsion, Lebanon's most ambitious sovereign act in a generation, and the UNSC filing. The ambassador expulsion became the ultimate test: the state made a sovereign decision, the Speaker of Parliament publicly vetoed it through extra-constitutional pressure, the Amal-adjacent religious leader Sheikh Qablan instructed the ambassador to stay, and Ambassador Shibani defied the Sunday deadline and remained in Beirut. **The state had made its most ambitious sovereignty assertion and suffered its most complete enforcement failure in the same week.**

This enforcement failure was not lost on the diplomatic community. Israel rejected the Barrack backchannel, calling it "nonsense," because it had already concluded that the Lebanese government could not deliver on its commitments. The Cyprus track was structurally incoherent from inception because Lebanon's delegation controlled none of the military activity it sought to negotiate an end to, and Berri, the one actor who historically converts Hezbollah positions into negotiable terms, was entirely absent from the architecture. The French framework was rejected simultaneously by Hezbollah, which would not accept a disarmament precondition, and by Israel, which would not accept the negotiations framing.

The causal chain is precise: **the state's declarations built legitimacy; the enforcement gap destroyed credibility; the credibility gap closed the diplomatic space that might have produced a framework to constrain the military campaign.** Five separate diplomatic initiatives failed in 28 days, and they failed for the same structural reason. Lebanon cannot negotiate a ceasefire for a war it does not control, with an enforcement instrument that publicly refuses to execute any agreement, and without the participation of the one actor whose consent the other side requires. By Week 4, the Lebanese government had internally assessed the current phase as diplomatically unresolvable and shifted from ceasefire-seeking to record-building: accumulating sovereignty declarations, international filings, and legal records for a post-war phase when conditions for a real agreement might emerge.



C. Causal Chain 3: Military Permanence → Political Recalculation → Deferred Confrontation

Netanyahu's "months or possibly years" framing, the 20 planned outposts, the March 29 expansion order, and the explicit statement by Israeli defense officials that the IDF does not plan to withdraw even if a ceasefire is reached together established that the military presence is not temporary. The cross-party Israeli political consensus eliminates the electoral variable: no serious prime ministerial candidate opposes the buffer zone principle, and the October 2026 Israeli elections will not revolve around security issues because consensus already exists. The Golan precedent confirms the trajectory: occupation in 1967, unilateral annexation in 1981, US recognition in 2019.

This **permanence forced every Lebanese political actor to recalculate around a long occupation rather than a short campaign**, and each recalculation produced a different downstream consequence.

For the Christian blocs, permanence validated the sovereignty-restoration narrative. The Maarab conference on March 28 crystallized four weeks of cross-party convergence into specific institutional demands: an accountability court to prosecute those responsible for dragging Lebanon into war; full reconstruction costs demanded from Iran; international forces authorized under UNSCR 1701 paragraph 12 and Chapter VII; and the explicit framing "a state, or no state." These are the demands the sovereignty coalition will bring to any post-war negotiation; they were forged in the war, not after it. **The "May 7" red line, invoked independently by Dagher, Bassil, and the Maarab statement, is not a reaction to Hezbollah coercion but a preemptive assessment that it is plausible:** multiple Christian political actors calculate that Hezbollah may turn its weapons inward once the external war ends.

For Berri, permanence sharpened the tension between his institutional role and his sectarian obligations. His progressive hardening across the four weeks, from endorsing the March 2 ban to publicly vetoing the ambassador expulsion, is a calculation that the war will not end quickly and his positioning must account for both the war and its aftermath. The Makki break, in which an Amal-adjacent minister defied the boycott and attended the March 26 cabinet session, is the first visible fracture in Shia bloc discipline during the conflict. Berri managed the ambassador crisis through a channel separate from the war conversation, maintaining an independent line of maneuver from Hezbollah while acting in concert on issues that engage Shia solidarity.

For Hezbollah, permanence confirmed the shift to insurgency preparation. The introduction of IEDs on March 19, the dispersal of hundreds of Radwan fighters into small cells across approximately 200 villages, the construction of defensive harassment lines, the SAM activation on March 24 and 25, the 99-attack peak on March 27: these are not temporary adaptations but a long-term operational posture designed for years of occupation. The tactical resilience is real. Hezbollah reached Ashkelon at 200km, scored a confirmed hit on the Bazan oil refinery in Haifa with the "Nasrallah" precision missile, and proved it retains effective anti-armor capability by destroying Merkava tanks at al-Tayba and Qantara. But without the IRGC coordination layer, without resupply through a now-defunct Syria corridor where Syrian authorities seized three smuggling tunnels in late March, and with an arsenal attrited from approximately 25,000 to 30,000 rockets to 11,000 to 13,000, **the trajectory points toward a protracted low-level insurgency rather than a campaign capable of reversing territorial gains.**

The conflict's central paradox sits here. Hezbollah is under maximum external military pressure while choosing maximum internal political restraint. A senior official confirmed the confrontation with the Salam government is deferred: "in wartime, anything that could shake the country must be avoided." When Hezbollah supporters gathered at the Grand Serail to attack Salam, the party's own MP tried to calm them down. Senior officials publicly distanced the party from the sit-in. This is not weakness. **It is the recognition that toppling the government now would trigger a cross-sectarian backlash Hezbollah cannot absorb** given the weight of public opinion against it, as articulated by allies and opponents alike. The paradox compounds: the longer the war continues, the more damage Hezbollah absorbs externally, and the more severe the deferred domestic confrontation becomes when it finally arrives. The party is building an insurgency posture against Israel while deferring a political confrontation against the Lebanese state, and the longer both tracks run in parallel, the higher the accumulated pressure in each.

The Sunni and Druze positions determine whether the sovereignty coalition holds or fragments. Salam is the sole Sunni institutional anchor; if his government falls, the Sunni community loses its only political representative, and the cross-sectarian coalition loses its constitutional legitimacy. Jumblatt's 96-hour silence following the Bchamoun strike, his gravitation toward the LAF rather than parliament, and his simultaneous dispatching of delegations to Maarab while maintaining contact with Berri position the Druze as the swing variable. Neither Sunni nor Druze positioning has hardened into a permanent alignment; both are calibrated for maximum post-war flexibility. The sovereignty coalition's viability depends on both remaining inside it.

D. Causal Chain 4: Diplomatic Exclusion → External Positioning → Future Leverage Architecture

Lebanon's exclusion from every active negotiation, the Pakistan track, the Islamabad Quadrilateral, the US-Israel closed-door conversations, did not produce a diplomatic vacuum. **It produced a positioning race in which every external actor optimizes for influence over the post-war order rather than for ending the current war.**

France committed armored vehicles to the LAF, a post-war military partnership bid. Two unnamed European states reached out to Hezbollah directly through intermediaries, the most structurally significant diplomatic signal of the month: it confirms that some European actors have concluded the Lebanese government track is insufficient and that any durable outcome requires engaging Hezbollah as a necessary party rather than an obstacle to be circumvented. Egypt's Foreign Minister visited Beirut, the most senior Egyptian visit since the war began, positioning Cairo for a post-war facilitation role. Saudi Arabia signaled readiness for commercial re-engagement, a post-war reconstruction lever calibrated to deploy after the military campaign has produced the conditions Riyadh has sought for two decades.

None of these actors is trying to end the current war through Lebanon-specific diplomacy. All of them are investing in the post-war order. **The gap between what Lebanon needs now, a ceasefire and enforcement guarantees, and what external actors are optimizing for, reconstruction contracts, military partnerships, political restructuring leverage, is itself a cross-dimensional finding.** It explains why every initiative fails while diplomatic activity intensifies. It explains why the Lebanese government shifted from ceasefire-seeking to record-building in Week 4. And it explains why the next phase of Lebanon diplomacy, whenever it arrives, will operate on different assumptions than the failed initiatives of March 2026: direct engagement with Hezbollah, Saudi-led reconstruction conditionality, French-equipped LAF deployment, and an international legal record built by a state that could not enforce its own decisions but could register them at the United Nations.

The AQAH vacuum is the economic expression of this positioning race. **Whoever fills it, the state, Hezbollah through alternative channels, or international actors, secures the primary economic and political loyalty of the Shia community in the post-war order.** The government's insistence during the conflict on direct transfer to displaced persons without intermediaries is a small but operationally significant assertion of state control over humanitarian flows. Amal's deep embedding in the state apparatus that manages reconstruction creates a competing loyalty structure against a financially degraded Hezbollah. The post-war contest between Amal and Hezbollah over who rebuilds the devastated Shia constituency will be fought at the municipal level over aid distribution, housing, and the resistance narrative's cost to the community. This contest will determine whether the Shia street's economic relationship is with the state, with Hezbollah, or with no institution at all.

III. THE EXTERNAL ARCHITECTURE

Gulf states occupy a triple role that makes their tolerance threshold the most consequential external variable for Lebanon's trajectory.

A. As Secondary Victims

Iran's retaliation escalated from open-water vessel targeting to sovereign port infrastructure when a tanker was struck at Dubai. Saudi Arabia, Qatar, Bahrain, and Kuwait all absorbed incoming strikes in a single overnight cycle. The Gulf states are paying a direct cost for a campaign whose primary theater is Lebanon but whose strategic logic is the destruction of Iran's regional deterrent posture.

B. As Architects of Exclusion

The Islamabad Quadrilateral produced Hormuz shipping proposals to Washington without including Lebanon in any deliverable. The regional powers coordinating around Iran optimize for energy security and their own strategic positioning. Lebanon's humanitarian crisis, displacement emergency, and institutional collapse do not appear in the Islamabad framework. The Gulf states' private lobbying for continued escalation confirms that they read the war as serving their strategic interests against Iran and oppose any premature cessation.

C. As Post-War Beneficiaries

Saudi Arabia's strategic patience, watching Hezbollah degrade before leading reconstruction, positions Riyadh as the primary external actor shaping Lebanon's post-war political order. The commercial re-engagement signals are a preview: reconstruction financing as leverage for political restructuring, deployed after the military campaign has produced the conditions Saudi Arabia has sought since Hezbollah's 2008 armed takeover of Beirut and before.

ANALYTICAL ASSESSMENT

The synthesis-level question: **at what point does the cost of the first role (absorbing Iranian strikes on sovereign territory and port infrastructure) exceed the benefit of the third role (post-war leverage over a weakened Lebanon)?** Reports that Trump informed aides he is willing to end the war even if Hormuz remains closed sharpen this question. The Gulf calculation has been: tolerate the war because it degrades Iran's regional posture, and the US will eventually secure Hormuz. **A US concession on Hormuz inverts this logic entirely.** If the United States accepts a closed or constrained Strait, the Gulf states absorb the economic cost of a conflict that degrades Iran's proxies without receiving the corresponding benefit of restored maritime security. If that threshold breaks, Gulf states shift from silent allies of the campaign to active advocates for a settlement including Lebanon. That shift would alter the US calculus, and with it the entire trajectory of the conflict, faster than any development on the ground.

IV. TRAJECTORY MAPPING — HOW THE CONFLICT CONTINUES

These trajectories are not mutually exclusive. They represent layers of operational reality that can coexist, overlap, and transition between each other. Observable indicators for each are specified in Section IV.

A. Trajectory A: Frozen Degradation (Highest Probability)

The Plateau: The IDF completes the buffer zone across all three axes and freezes positions. No diplomatic framework forms. Hezbollah sustains a low-intensity insurgency at a level the IDF absorbs without requiring campaign-level escalation: daily IED, ATGM, and drone attacks against holding positions, calibrated to impose cost without crossing the threshold that triggers expansion. The Salam government survives in declaratory sovereignty mode; Berri returns through a face-saving formula in which the ambassador question is removed from the cabinet agenda rather than formally reversed. Displacement normalizes into a semi-permanent condition for Shia border communities. The humanitarian system holds at its current margin of zero without crossing into cascade failure. Gulf tolerance holds.

This trajectory is highest probability because it requires no decisive action from any actor. All four dimensions degrade slowly without catastrophic rupture. The political question shifts from "how does the war end" to "how does Lebanon function under open-ended occupation." The Amal-Hezbollah resource competition over post-war reconstruction becomes the dominant internal dynamic, fought at the municipal level, quiet and survivalist rather than ideological. The IDF manpower ceiling, flagged by Chief of Staff Zamir at a 20,000-soldier deficit, creates institutional pressure for a freeze rather than expansion, even as the geographic logic of the Nabatiyeh ridgelines creates structural pressure for expansion beyond the Litani. The tension between these two pressures defines the buffer zone's final depth. The sovereignty coalition's institutional demands crystallized at Maarab sit in storage, awaiting the post-war conditions that do not arrive because the war does not end. It persists.

B. Trajectory B: Escalation Spiral

The Cascade: One dimension's crisis cascades across the other three. Multiple trigger sequences are plausible, and each activates a chain that runs through all four dimensions simultaneously.

A Hezbollah strategic strike on high-value Israeli infrastructure, a capability proven by the Ashkelon reach at 200km and the Bazan refinery hit, forces IDF expansion beyond the current buffer zone.

Mass secondary displacement floods into a system at 97% occupancy with zero absorption margin.

The humanitarian system's fuel-transport-medical interdependency loop closes: bridge destruction severs distribution routes, fuel shortages disable hospital generators within 48 to 72 hours, collapsed surgical capacity cannot be restored because the supply chain that feeds it is severed at the same points. Sectarian violence at displacement centers, tracking the Week 1 through Week 4 escalation pattern from passive screening to armed confrontation, forces the LAF to choose between internal security and border management, a choice that exposes the institution's structural inability to perform either function under current conditions. A UNIFIL mass-casualty event following the three peacekeeper deaths on March 30 triggers troop-contributing nation consultations that produce withdrawal of the last international observer layer, eliminating the political tripwire that constrains expanded Israeli operations.

Each trigger activates a chain that runs through all four dimensions simultaneously. Lower probability than frozen degradation, but highest consequence. The humanitarian system's position at zero margin means the distance between the current state and cascade failure is a single shock event.

C. Trajectory C: Military Constraints Force Diplomatic Reality

The Diplomatic Opening: The only pathway to Lebanon's inclusion in a framework. Over two to three months, the IDF's manpower constraint materializes as a binding operational limit. Six divisions cannot be sustained in Lebanon while the Iran campaign continues. Zamir's 20,000-soldier deficit warning is the institutional basis for this limit. Reserve formations committed to front-line combat, not support roles, cannot rotate indefinitely at the current tempo. This military limitation creates the first structural opening for the US-Iran track to revisit the Lebanon linkage.

Simultaneously, if Gulf tolerance breaks because the cost of absorbing Iranian strikes on sovereign territory exceeds the benefit of watching Hezbollah degrade, the Islamabad framework shifts from Hormuz-only to a broader settlement that must address the Lebanon front. A Gulf state publicly calls for a settlement including Lebanon. **The convergence of internal Israeli military constraint and external Gulf tolerance shift is the only combination of conditions under which a ceasefire framework becomes structurally possible.**

This trajectory is lowest probability because it requires two independent conditions to materialize simultaneously: Israeli institutional exhaustion severe enough to translate into a political constraint on Netanyahu, and a Gulf recalculation dramatic enough to shift Washington's position on the Lebanon linkage. But it is the only trajectory that produces a fundamentally different outcome rather than a variation on the current one. The Pakistan channel's item-by-item negotiation posture keeps the diplomatic architecture alive, and Iran's strategic logic for the simultaneous cessation demand strengthens with each week of arsenal depletion. If the 11,000 to 13,000 remaining rockets fall below the threshold Tehran considers a credible deterrent, Iran's negotiating urgency increases even as the asset it seeks to protect diminishes. The paradox: the longer Iran delays agreement, the less deterrent value the demand protects.

V. OBSERVABLE INDICATORS

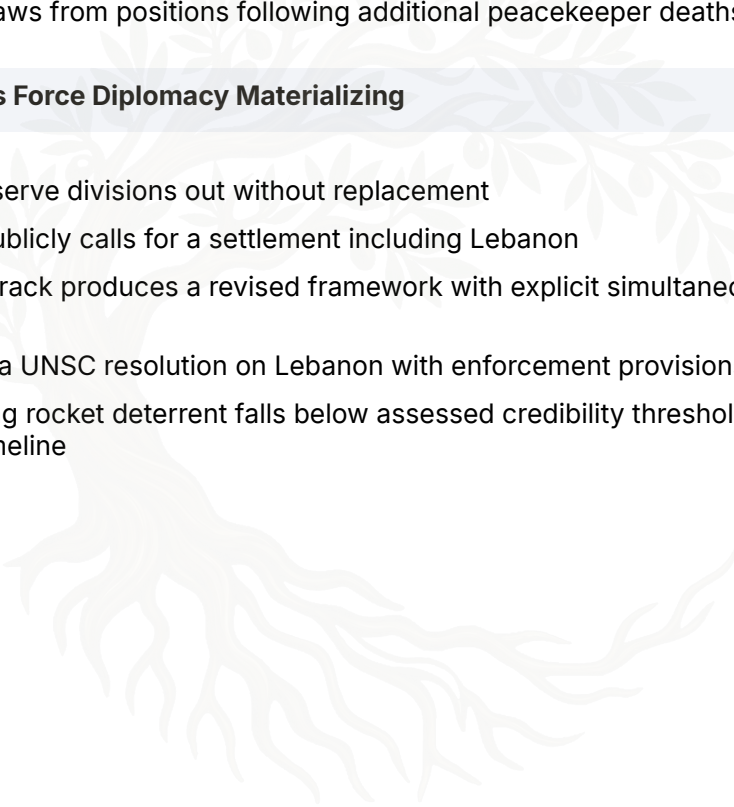
A. Frozen Degradation Materializing

- IDF announces buffer zone connectivity across all three axes
- Hezbollah daily operations stabilize at 20 to 40 without escalation beyond current weapons envelope
- Cabinet reconvenes with Shia ministers; ambassador issue absent from agenda
- Gulf states absorb another major Iranian strike cycle without shifting diplomatic posture
- No new Lebanon-specific diplomatic initiative launched
- Humanitarian system holds at 97% occupancy without cascade trigger event

B. Escalation Spiral Materializing

- IDF announces expansion beyond current buffer zone limits (Zahrani or Sayniq/Awali line)
- Hezbollah executes a strategic strike on high-value Israeli infrastructure (port, airport, power grid)
- Successful SAM shoot-down of an Israeli combat aircraft
- Major shelter site collapse or violent sectarian clash involving weapons at a displacement center
- Diesel supply interruption to Beirut hospitals lasting beyond 48 hours
- UNIFIL withdraws from positions following additional peacekeeper deaths

C. Constraints Force Diplomacy Materializing

- IDF rotates reserve divisions out without replacement
 - A Gulf state publicly calls for a settlement including Lebanon
 - The Pakistan track produces a revised framework with explicit simultaneous cessation on the Lebanon front
 - France tables a UNSC resolution on Lebanon with enforcement provisions
 - Iran's remaining rocket deterrent falls below assessed credibility threshold, accelerating Tehran's negotiating timeline
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STRATEGIC ANALYSIS

LEBANON UNDER SIEGE

The Military Dimension

March 2026

KEY JUDGMENTS

1. The IDF deployed six divisions to construct a continuous buffer zone from Naqoura to the Shebaa Farms. This four-phase escalation **expanded a stated "forward defense" operation into the largest Israeli territorial occupation in Lebanon since 2006.**
2. The IDF systematically applied a Gaza-derived operational doctrine in Lebanon. This doctrine has three pillars: expanding the definition of "military targets" to include financial (AQAH) and social (IHA) infrastructure; using **controlled demolitions to render border villages permanently uninhabitable**; and treating civilians south of evacuation lines as potential combatants.
3. Hezbollah maintained high-volume tactical fire, peaking at 99 claimed operations in one day, and demonstrated weapons diversification including SAMs and FPV drones. **This tactical resilience masks severe strategic degradation.** The group lost its Iranian coordination layer, its financial infrastructure, its resupply corridor, and its ability to hold fixed territory against armored advances.
4. The Lebanese Armed Forces (LAF) adopted a non-combatant posture to ensure institutional survival. They absorbed deliberate Israeli fire, with at least seven soldiers killed, and declined to enforce the government's anti-Hezbollah decrees. **This posture is a structural constraint, not a strategic choice.**
5. **The physical reality of the buffer zone outpaced any diplomatic framework by March 29.** The 14km depth and 20 planned outposts constitute an irreversible geographic fact. This territorial reality will dictate the starting point of any post-war security architecture.
6. The preconditions for an SLA-like collaborationist formation exist. These include concentrated Shia displacement, physical destruction of border towns, and differential treatment of non-Shia communities. **Severe legal deterrents, however, currently prevent its emergence.**

CENTRAL QUESTION

What did the IDF actually accomplish militarily in Lebanon between March 2 and March 29, and what is Hezbollah's actual operational state as of March 29?

I. CAMPAIGN PHASES AND IDF OPERATIONAL ARCHITECTURE

The IDF campaign in Lebanon evolved through four distinct phases between March 2 and March 29. Each phase was conditioned on Hezbollah's response level and the domestic and international tolerance thresholds available to the Israeli government. The escalation was planned. Specific decision points preceded each phase transition. **Each phase committed the IDF to a deeper operational footprint, which narrowed the range of politically viable exit options.**

A. Phase 1: Retaliatory Air Campaign

March 1-3

Phase 1 ran from March 1 to March 3. It consisted of a retaliatory air campaign triggered by Hezbollah's strike on Mishmar al-Karmel near Haifa, which broke fifteen months of ceasefire. The IDF response was immediate and broad. The air force struck over 70 weapons depots and launch sites on March 2 alone. Coordinated strikes targeted al-Qard al-Hassan branches across Beirut. **Decapitation strikes killed intelligence headquarters chief Hussein Mekeld, IRGC Quds Force Lebanon Corps Commander Daoud Ali Zada, and Chief of Staff Reza Khazai on March 3.** Evacuation orders covered 53 villages south of the Litani. The Ramada Hotel strike in Raouche on March 8 killed four additional IRGC Quds Force commanders. This confirmed the Lebanon Corps' communications were compromised and the IDF possessed deep SIGINT and HUMINT penetration of the Iranian advisory layer.

B. Phase 2: Forward Defense Maneuvers

March 3-12

Phase 2 ran from March 3 to March 12 and featured "forward defense maneuvers" authorized by the political echelon. Three divisions deployed along distinct axes. The 91st Territorial Division moved into the eastern sector along border approaches. The 210th Territorial Division advanced through the Mount Dov and Shebaa Farms corridor. The 146th Reserve Armored Division deployed along the western coastal sector. **The military framed these operations as "limited and targeted," establishing observation posts and security layers from five permanent positions** retained since the November 2024 ceasefire. IDF forces advanced into Khiam and Mays al-Jabal. By March 8, the IDF claimed 600 targets struck and over 200 Hezbollah fighters killed.

C. Phase 3: Escalation and Expansion

March 12-16

Phase 3 ran from March 12 to March 16. **It broke decisively from the inherited 1701 framework.** Defense Minister Katz instructed the IDF to prepare an "expansion of activity." Three indicators defined the transition. First, the evacuation line shifted north to the Zahrani River, approximately 56km from the border, nearly doubling the buffer depth. Second, the IDF destroyed the Zararieh Bridge over the Litani on March 13. This was the campaign's first major infrastructure strike. Third, the military announced the 98th Paratrooper Division deployment and transferred the Golani Brigade from Southern Command in Gaza to Northern Command on March 11. On March 16, the IDF announced a "targeted ground operation" that Katz explicitly compared to Gaza operations.

D. Phase 4: Multi-Division Ground Offensive

March 16-29

Phase 4 ran from March 16 to March 29 and constituted a multi-division ground offensive. **Five, then six divisions committed to a three-axis advance.** On the western axis toward Naqoura, the 146th Reserve and 162nd Divisions advanced with Brigade 226, the 613th Hasmonean Battalion, and the 300th Infantry Brigade. Brigade 226 advanced from Labbuneh south toward Naqoura and controlled most of the town by March 26. Qantara village was destroyed. The coastal road became an IDF supply corridor. Tyre evacuation orders issued March 24 covered al-Burj al-Shamali, al-Maashouq, and Tyre city. On the central axis from Markaba to Bint Jbeil, the 36th Armored Division and the 91st Territorial Division advanced in coordinated thrusts. The 84th Brigade seized most of Khiam by March 24. IDF armor entered Markaba center on March 26. The 91st Division advanced from hills east of Maroun el-Ras toward Bint Jbeil. Meiss el-Jabal hospital was seized on March 27. Large-scale demolitions occurred in Taybeh and Ayta al-Shaab. The 401st Brigade pushed into eastern Ayta al-Shaab. On the eastern axis through Arkoub and Shebaa, the 210th Territorial Division, 810th Mountain Infantry Brigade, and the IDF Alpinist Unit advanced 2.5km past the border to Jabal al-Sedana. Nighttime operations proceeded in the Shebaa Farms area. Ground-level clashes erupted at Qawzah village, which Hezbollah artillery targeted five times in one day. The tactical objective was control of Tayri Hill. This hill overlooks Bint Jbeil and provides commanding sightlines toward Kunin and Beit Yahoun. The 98th Paratrooper Division deployed as the sixth committed division by late March. Its first killed-in-action, from the 890th Battalion of the 35th Paratroopers Brigade, fell on March 29. By that date, IDF units were positioned 9 to 14km inside Lebanese territory. Netanyahu ordered expansion of the "security zone" and described operations as lasting "months or possibly years."

ANALYTICAL ASSESSMENT

The four-phase escalation followed a consistent internal logic. The shift from Phase 2 to Phase 3 occurred when Hezbollah sustained 200 rocket days and extended range to 135 to


160km. This crossed the threshold requiring a ground response beyond air operations. **The Zahrani expansion and bridge destruction on March 12 and 13 proved the IDF discarded the inherited 1701 framework and committed to a territorial solution.** Force commitments increased as Hezbollah's fire volume confirmed the insufficiency of air operations alone. The operational architecture reveals an IDF that planned for escalation dominance from the outset but required Hezbollah's fire to justify each successive phase politically.

II. THE GAZA DOCTRINE APPLIED TO LEBANON

The IDF conduct in Lebanon utilizes a doctrine tested and refined in Gaza since October 2024. This doctrine operates through three integrated pillars. The evidence for each is anchored in specific strikes, policy statements, and the Yellow Line concept's documented transfer from Gaza to Lebanon.

A. Pillar 1: Expanded Definition of "Military Targets"

The first pillar is the systematic expansion of the definition of "military target." The targeting campaign progressed through four concentric rings of Hezbollah's ecosystem. **Each ring widened what Israel treats as a legitimate military object.** The innermost ring, military infrastructure, was struck from March 2 onward. Over 70 weapons depots and launch sites were hit on the first day. By March 27, the IDF claimed 3,000 targets and dropped 15,000 bombs on "Iranian system" targets. The second ring, financial infrastructure, was targeted on March 9 and 10 through coordinated attacks against Al-Qard al-Hassan branches across Beirut in Bir al-Abed, Haret Hreik, the airport road, and the Nouairi district. The targeting was surgical. Specific office suites and server rooms were hit instead of entire buildings. This indicates deep intelligence penetration of AQAH's physical footprint. Over 30 AQAH branches were destroyed across the campaign. The third ring, social services infrastructure, was struck from March 13 onward. Islamic Health Authority centers were hit on March 13. NewPharm pharmaceutical stores were destroyed. Al-Nour radio and al-Manar TV broadcasting centers were struck. Community institutions fell within the target set, including the husseiniya in Qalawiyeh and the Islamic Scouts hall in Majdal Zoun. A Radwan Force headquarters in Beirut and the Nour Radio broadcasting center in al-Tayri were hit. The fourth ring, logistics and fuel infrastructure, was struck on March 24 and 25. **The Amana Fuel Company gas station network, owned by Hezbollah and sanctioned by the US since February 2020, was destroyed across multiple strike waves.** Hezbollah fuel depots throughout the south were simultaneously hit under "logistics infrastructure" targeting. The al-Boyan construction company, Hamas operatives, PIJ commanders, and IRGC personnel across Beirut all fell within the same operational logic. The targeting set treated every entity connected to Hezbollah's social, financial, medical, media, and logistics ecosystem as a legitimate military target.



B. Pillar 2: The Yellow Line Free-Fire Zone

The second pillar is the Yellow Line. This is an operational system functioning in Gaza since October 2025, now replicated in Lebanon. Israel controls 53% of Gaza's territory east of the Yellow Line. Nearly all Palestinians, over two million people, have been displaced west of it. **The area east of the line is a declared free-fire zone.** Yellow-painted concrete markers were physically placed along the line beginning October 2025. Satellite imagery analyzed by BBC Verify in January 2026 revealed that these markers are being moved silently deeper into the Strip. In the Tuffah neighborhood of Gaza City, markers shifted 295 meters westward between November 27 and December 25, 2025. IDF Chief of Staff Zamir declared on December 7, 2025, that the Yellow Line is a new border line, a forward defensive line, and a line of operational activity.

The transfer to Lebanon is explicit in political rhetoric and operational planning. Opposition leader Yair Lapid called on March 6 for a permanent "Yellow Line" inside Lebanon, using the phrase "scrape away two or three Lebanese villages." Benny Gantz's November 2025 "1948 Mindset" security doctrine called for "buffer zones outside the border." Avigdor Liberman demanded reoccupation of South Lebanon for "50 years." **On March 13, an Israeli security source confirmed the IDF intends to create a seven-to-eight-kilometer buffer zone in southern Lebanon similar to the Yellow Line in the Gaza Strip with 20 planned outposts.** On March 22, Katz ordered acceleration of the demolition of Lebanese homes in border villages to neutralize threats to Israeli cities, following the model of Beit Hanoun and Rafah in the Gaza Strip. On March 29, Israeli defense officials told media that the IDF does not plan to withdraw from Lebanese territory even if Lebanon and Israel reach a ceasefire agreement.

The cross-party consensus eliminates the electoral variable. The Jerusalem Strategic Tribune confirmed in January 2026 that the upcoming October 2026 elections will not revolve around security issues because consensus already exists. No serious Israeli prime ministerial candidate opposes the buffer zone principle. The Golan precedent confirms the trajectory: occupation in 1967, unilateral annexation in 1981, US recognition in 2019. After Assad's fall in December 2024, Israel seized the UN-mandated buffer zone in southern Syria. Netanyahu announced the military would remain for an unlimited amount of time. **Temporary occupation becomes permanent annexation across all three theaters.**

C. Pillar 3: Systematic Demolition and Depopulation

The third pillar is systematic demolition and depopulation of border territory. Controlled demolitions were documented in Taybeh, Aita al-Shaab, Khiam, and Qantara. Pre-war destruction data confirms the pattern. In Kfar Kila alone, more than 1,300 structures and 133 acres of orchards were destroyed between September 2024 and January 2025. Demolitions continued through the November 2024 ceasefire period. **The 146th Reserve Division destroyed over 200 Hezbollah targets in its sector.** The 1st Golani Infantry Brigade destroyed more than 100 Hezbollah sites in the Taybeh area in late March. In the medical domain, Meiss el-Jabal hospital was seized on March 27. This eliminated the last functioning medical facility south of the Litani in the central sector. Health Ministry data through March 28 recorded 75 attacks on the health sector, nine hospitals targeted, 51 health workers killed, and 42 paramedics and first responders killed since March 2. On March 28, the IDF killed two news correspondents working for Hezbollah-affiliated outlets; one was identified as a Radwan Force member.

ANALYTICAL ASSESSMENT

The three pillars operate as an integrated system. **Demolition creates the empty ground that the Yellow Line model requires.** The expanded target definition ensures no Hezbollah-connected institution survives to contest the new territorial arrangement. In Lebanon, the IDF initially maintained a nominal distinction between Hezbollah and the Lebanese state. That distinction is eroding. The Hazmieh strike on March 24, which killed an IRGC operative in a Christian suburb, and the Bchamoun strike the same day in a Druze town demonstrate that the IDF is tracking targets across sectarian geography. The military accepts civilian casualties in non-Shia areas. If this pattern accelerates, the nominal distinction will dissolve completely.

III. BUFFER ZONE PHYSICAL REALITY AS OF MARCH 29

The IDF's territorial control as of March 29 covered approximately 60 to 70% of a continuous Litani buffer zone. Six divisions were committed across three axes.

Axis	Involved Units	Key Locations and Progress
Western	146th Reserve Armored Division, 162nd Armored Division (Atzmon), Brigade 226, 613th Hasmonean Battalion, 300th Infantry Brigade	Brigade 226 advanced from Labbuneh south toward Naqoura, controlling most of the town by March 26. Qantara village destroyed. Coastal road functioning as IDF supply corridor. Tyre evacuation orders issued March 24 covering al-Burj al-Shamali, al-Maashouq, and Tyre city.
Central	36th Armored Division (7th Armored Brigade, 1st Golani Infantry Brigade, 188th Armored Brigade), 91st Territorial Division (84th Givati Brigade, 401st Armored Brigade, 7338th Artillery)	84th Brigade seized most of Khiam by March 24. IDF armor entered Markaba center March 26. 91st Division advanced from hills east of Maroun el-Ras toward Bint Jbeil. Meiss el-Jabal hospital seized March 27. Large-scale demolitions in Taybeh, Ayta al-Shaab. 401st Brigade pushed into eastern Ayta al-Shaab. Hezbollah tunnel discovered under a church in Khiam with new shafts constructed during the ceasefire.
Eastern	210th Territorial Division, 810th Mountain Infantry Brigade, IDF Alpinist Unit	Advanced 2.5km past border to Jabal al-Sedana. Nighttime operations in Shebaa Farms. Seizure of Lebanese Saraya member. Ground clashes at Qawzah village. Tactical objective is control of Tayri Hill, overlooking Bint Jbeil with commanding sightlines toward Kunin and Beit Yahoun.

The 98th Paratrooper Division (Res.) deployed as the sixth committed division by late March. Its first killed-in-action fell on March 29. **Reserve formations are now committed to front-line combat, not support roles.**

If the IDF connects Naqoura to Markaba to the Bint Jbeil-Arkoub arc, it achieves a continuous Litani buffer zone south of the river. Consolidation was roughly 48 to 72 hours from achievable as of March 27. Seven Litani bridges were destroyed to sever north-south movement for both military resupply and civilian escape.

A. The Firing Geometry Problem

The western sector is adequately handled by a Litani-depth buffer. Clearing positions south of the river eliminates Arash-4 launch sites within range of most western border communities. It pushes Fadi-1 positions to the edge of their effective envelope. The eastern sector inverts this logic. The Galilee Panhandle extends northward as a narrow salient, and the Golan Heights border sits at higher elevation closer to Hezbollah's operating area. **A 25km western buffer translates to a much shorter effective buffer on the eastern flank.** The Nabatiyeh ridgelines are the critical terrain. Hezbollah concentrates the majority of its rocket launches from ridge positions located south and east of Nabatiyeh, sandwiched between the Litani and Zahrani Rivers. From these elevated positions, the 122mm Arash-4 reaches all Israeli border towns and the Lower Galilee. The 220mm Fadi-1 reaches the Upper Galilee and Haifa. On March 12 alone, approximately 200 rockets were fired from these ridgelines. **A separate ATGM layer persists.** Almas-3/4 anti-tank guided missiles operate from positions east of Nabatiyeh and reach Israeli border towns directly. They run on a distinct targeting cycle unaffected by rocket suppression operations.

This firing geometry explains Israel's river-to-river escalation calculus. The Litani line suppresses the western sector but leaves the eastern flank exposed. **The Zahrani line degrades the majority of Arash-4 and Almas firing positions.** A Sayniq/Awali line would eliminate nearly all Arash-4 positions and degrade Fadi-1 geometry. Each step yields less suppression per kilometer gained while political costs climb. The structural pressure for expansion beyond the Litani is embedded in the geography itself.

B. The Manpower Ceiling

IDF Chief of Staff Zamir warned on March 26 that the IDF is collapsing under a 20,000-soldier deficit. Former PM Bennett stated that Zamir was confirming what he had warned of for two and a half years. The reserve manpower system operates beyond designed tempo. Fifteen soldiers were evacuated with hypothermia from the Lebanon front. **The ultra-Orthodox draft exemption law was deferred, sustaining coalition dependence on ultra-Orthodox partners at the direct cost of operational needs.** This warning establishes a finite operational window. The IDF can sustain current tempo for a bounded period. The operational logic is to secure maximum territorial footprint before manpower factors force a halt.

ANALYTICAL ASSESSMENT

The buffer zone was approximately 60 to 70% connected by March 29. **The six-division commitment represents the largest Israeli ground presence in Lebanon since 2006.** The current buffer depth remains insufficient to fully suppress rocket fire from Nabatiyeh ridgelines. Zamir's manpower warning introduces a race between territorial consolidation and institutional exhaustion.

IV. HEZBOLLAH'S ACTUAL OPERATIONAL STATE

Hezbollah's tactical volume and diversification increased steadily across four weeks. Simultaneously, its strategic institutional capacity degraded. **The "mosaic defense" adopted after IRGC restructuring provides tactical flexibility but removes the ability to pursue a coherent campaign plan.**

A. Week 1 (March 1-7)

Command Decapitation

Week 1 (March 1-7) was defined by short-range response and command decapitation. Fire rates ranged from 9 to 23 claimed attacks per day. These predominantly utilized short-range rockets targeting northern border communities. Command losses were severe. **IRGC Quds Force Lebanon Corps Commander Daoud Ali Zada and Chief of Staff Reza Khazai were killed on March 3.** Intelligence headquarters chief Hussein Mekeld was killed the same day. By March 8, the Ramada Hotel strike in Raouche killed four additional IRGC Quds Force commanders. The IRGC Quds Force Lebanon Corps was effectively eliminated. On the ground, Hezbollah units engaged IDF forces at Aitaroun and Khiam, halting advances after multi-hour engagements. First-line defensive positions remained intact and inflicted casualties.

B. Week 2 (March 8-14)

Volume Surges

Week 2 (March 8-14) introduced long-range capability and volume surges. Fire rates rose to 19 to 33 claimed attacks per day. Daily rocket volume escalated to approximately 150 per day. **On March 9 and 10, Hezbollah executed its first confirmed long-range precision strikes.** The Rehavam Camp near Ramla was hit at approximately 135km, wounding 16. The IDF Satellite Communications Station in the Elah Valley was struck at approximately 160km with confirmed structural damage. A Hezbollah drone penetrated to Haifa Bay on March 13 without interception. The volume peak came on March 11, when over 850 rockets were fired at northern Israel. Approximately 200 rockets were fired in a single barrage on March 12, predominantly from ridges south and east of Nabatiyeh. Nasr Unit Commander Abu Hussein Ragheb was killed. This degraded command coordination in the critical eastern sector. The IRGC restructured Hezbollah into decentralized, compartmentalized units under a "mosaic defense" model. Hundreds of Radwan fighters operated in small cells across approximately 200 villages south of the Litani.

C. Week 3 (March 15-21)

Tactical Adaptation

Week 3 (March 15-21) brought weapons diversification and tactical adaptation. Fire rates ranged from 18 to 57 claimed attacks per day. Daily averages rose to 150 rockets per day, with 60% landing in Israeli territory. Two simultaneous IED attacks on March 19 in Taybeh and Aitaroun marked the introduction of a new tactic. Ashkelon was reached at approximately 200km. **The "Nasrallah" precision missile system scored a confirmed direct hit on the Bazan oil refinery complex in Haifa.** Radwan Force special operations commander Hussein Moussa Bourji was confirmed killed on March 21 along with two nephews. This constrained capacity for complex cross-border operations. Israeli military analysis confirmed Hezbollah shifted from holding fixed positions to withdrawing into residential blocks and forest cover ahead of armored advances. A separate assessment concluded Hezbollah was constructing defensive harassment lines designed to complicate any eventual Israeli withdrawal.

D. Week 4 (March 22-29)

Air Defense Activation

Week 4 (March 22-29) produced peak volume and air defense activation. Fire rates surged to 53 to 99 claimed attacks per day. On March 27, Hezbollah claimed 99 attacks in a 24-hour period. Fifty-seven percent of these targeted IDF forces in southern Lebanon. Thirty-six rocket attacks, 12 drone attacks, and two mortar attacks targeted Israeli positions and communities in northern Israel. Hezbollah fired surface-to-air missiles at an Israeli combat aircraft on March 24 and 25. A second SAM targeted an Israeli helicopter over Kafarkela airspace on March 26. **Two SAM events in 48 hours constitute a deliberate shift from passive to active air defense posture.** Twenty-one drone attacks were claimed on March 25. This reflects Hezbollah's reallocation of its munitions budget to domestic drone production. A Merkava tank was destroyed at al-Tayba on March 25. A second Merkava was struck at Qantara on March 26. Guided missiles targeted three Merkavas and a D9 bulldozer west of al-Tayba in a single engagement. FPV drones, including fiber-optic variants, were deployed against Israeli Merkava and Namer armor. Rocket fire killed an Israeli civilian in Nahariya on March 26. Kiryat Shmona triggered air raid sirens 23 times on March 25 alone. A suicide drone scored a confirmed direct hit on the Ras al-Naqoura naval radar installation. Nine Israeli soldiers were wounded on March 27 alone. One soldier was killed March 28. A second IED ambush on March 29 near Ainata combined IEDs with drones and light weapons.

E. Arsenal Status and Sustainability

The remaining rocket arsenal is estimated at 11,000 to 13,000, severely attrited from a pre-war baseline of approximately 25,000 to 30,000. **The Iran-Syria-Lebanon supply corridor is functionally defunct.** Syrian authorities seized and closed three Hezbollah smuggling tunnels near Hawsh al-Sayyid Ali in Homs Province on March 28 and 29. Hezbollah is fighting with existing stocks. At 150 rockets per day, ammunition depletion becomes the binding constraint within weeks without resupply. Hezbollah has stopped publicly naming battlefield dead. A floor estimate is 400 killed according to Hezbollah sources, or 800 killed according to IDF claims. Total IDF ground casualties through March 29 are 4 to 5 confirmed killed in the Lebanon theater.

ANALYTICAL ASSESSMENT

The tactical adaptation is evident through IEDs, SAMs, drone surges, FPV innovations, and dispersal into residential cover. The SAM activation and 99-attack peak on March 27 demonstrate Hezbollah retains the capacity to impose costs and complicate IDF air operations. The Ashkelon strike at 200km and the Nasrallah missile hit on the Bazan refinery prove high-tier strategic assets survived the air campaign. However, **without the IRGC coordination layer, without resupply, and with leadership attrition accelerating at the field-commander level, the trajectory points toward a protracted low-level insurgency rather than a campaign capable of reversing territorial gains.** The mosaic defense provides survivability. It does not provide strategic direction.

V. THE LAF AS A MULTI-CONSTRAINT ACTOR

The Lebanese Armed Forces operated under four simultaneous pressures. Together, these explain why the institution maintained a non-combatant posture throughout the 28-day period. **This posture is a structural constraint, not a strategic choice.** The week-by-week evidence reveals an institution in progressive retreat. It absorbed casualties from Israel while refusing orders from the Lebanese government.

A. 1. Israeli Military Action

The first pressure is Israeli military action. **The IDF treated the LAF as an obstacle to displace, not an adversary to engage.** The pattern began on March 3, when the LAF withdrew from over 50 border positions and several barracks as the IDF authorized forward defense maneuvers. The withdrawal was preemptive. On March 6, the LAF repositioned from forward posts near Saddaneh to defensive anchors at town entrances. On March 7, the Nabi Chit operation in the eastern Bekaa killed three LAF soldiers, one General Security officer, four children, and 41 people total. The IDF allegedly impersonated LAF units during insertion. This tactic makes it impossible for checkpoint officers to distinguish between LAF convoys and Israeli commando teams, permanently damaging civil-military trust. The 90-minute detection lag before Hezbollah engaged indicated compromised surveillance. The LAF did not retaliate. On March 17, an Israeli drone strike targeted an LAF convoy near Qa'qa'iyya al-Jisr, wounding five soldiers. On March 27, the LAF evacuated the Sarbin barracks and repositioned at the Khardali checkpoint on the eastern Litani approach. Preparations began to reposition at the Kafra checkpoint as Israeli forces advanced. On March 30, an eighth LAF soldier was killed at a checkpoint near Tyre. A total of eight soldiers were killed by Israeli fire between March 2 and March 30.

B. 2. Government Political Expectations

The second pressure is government political expectations. The Salam government demanded the LAF enforce the March 2 cabinet ban on Hezbollah's military activities. **LAF Commander Haykal refused to carry out the ban in operational terms.** The response was token: approximately 26 arrests, seizure of some launchers, one raid in Tripoli, and the interception of eight Hezbollah operatives transporting rockets on March 24. The military tribunal issued two arrest warrants for Hezbollah fighters. Operational enforcement did not follow.

C. 3. Hezbollah's Implicit Veto

The third pressure is Hezbollah's implicit veto. Approximately 30% of LAF personnel are Shia. The "National Officers" manifesto, circulated on March 12, warned that deploying against Hezbollah risks division and weakening of the military institution. Officers split into two camps: those threatening to resign if Commander Haykal is fired, and those warning that deploying against Hezbollah would cause the institution to fragment along sectarian lines. President Aoun sidelined discussions on removing Haykal. He calculated that a wartime change in command would cause institutional paralysis or mass resignations. **This manifesto is the structural veto that political creativity cannot circumvent.**

D. 4. Institutional Survival

The fourth pressure is institutional survival. **The LAF prioritized self-preservation as a national institution.** It maintained humanitarian mandates and a coordination hotline with Damascus. It asserted judicial authority through the military tribunal without operational enforcement. Interior Minister Hajjar announced reinforced security force presence after the Hazmieh and Bchamoun strikes, but no confirmed LAF deployment materialized. A Lebanese security operation documenting the distribution of Iranian nationals across Lebanese territory was reported during Week 4. If confirmed, this is the first Lebanese state intelligence-gathering operation targeting the IRGC footprint inside its own territory.

ANALYTICAL ASSESSMENT

The LAF trajectory is one of progressive institutional retreat. Each week brought additional casualties, withdrawals, and an expanded credibility gap between the government's sovereignty claims and the military's capacity to enforce them. **The LAF cannot simultaneously pledge disarmament, maintain institutional cohesion, and survive Israeli fire. It chose survival.**

The political implications will be analyzed in Report 3.

VI. SLA-LIKE FORMATION ASSESSMENT

The preconditions for a collaborationist formation analogous to the South Lebanon Army (1985-2000) are present. The formation itself is not.

A. Six Preconditions Exist

Six preconditions exist. First, concentrated Shia displacement from border areas, with over one million self-registered as displaced. Second, physical destruction of border villages rendering them uninhabitable. Third, sectarian vetting by host communities. **Landlords in Christian and Sunni areas frequently refuse tenants with suspected Hezbollah connections, creating soft sectarian segregation.** Fourth, IDF occupation infrastructure is being established, with 20 planned outposts, six committed divisions, and bridge destruction isolating the south. Fifth, non-Shia border communities receive differential treatment. Sixth, economic desperation in displacement camps is rising.

B. The Legal Deterrent

The legal deterrent remains substantial. Penal Code Articles 273-285 and the 1955 Boycott Law pose severe statutory barriers to collaboration. The memory of the SLA's collapse in May 2000 and the social stigma attached to collaboration act as powerful community deterrents.

C. The Model Distinction

A key distinction separates the current model from the 1985-2000 Security Zone. **The Yellow Line model tested in Gaza does not require a local proxy.** It is based on emptying the area and converting it into a free-fire zone under exclusive IDF control. Lobby 1701 explicitly distinguishes the desired model from the old Security Zone, describing it as similar to the Yellow Line in Gaza. The second structural difference is Israeli political consensus. In the 1990s, Israeli public opinion was deeply divided over the Security Zone. After October 7, no prominent Israeli opponent of the buffer zone principle exists.

ANALYTICAL ASSESSMENT

The probability of an SLA-like formation emerging is assessed at 10 to 15% during the March period. This probability rises if occupation persists beyond three months and displacement camps produce severe economic desperation. **The Yellow Line model's preference for depopulated exclusion zones over proxy-staffed occupation zones may render the question moot** if the current trajectory holds.

VII. THREE MILITARY TRAJECTORIES

The following trajectories are not mutually exclusive alternatives. They represent a layered sequence of overlapping operational realities. Elements of all three are visible in the data as of March 29. The establishment of the buffer zone does not end the war; it creates the geographic container for the next phase.

A. Trajectory 1: Frozen Buffer Zone

The IDF completes its Litani buffer, connects the three axes, and freezes positions. A ceasefire formalizes the territorial status quo. The IDF holds the buffer with rotating reserve formations. The 20,000-soldier manpower deficit flagged by Zamir creates institutional pressure for a freeze rather than immediate expansion. Netanyahu's March 29 directive to expand the security zone operates in tension with this constraint. **Israeli defense officials stated on March 29 that the IDF does not plan to withdraw from Lebanese territory even if a ceasefire is reached.** The buffer zone becomes de facto permanent through the same mechanism as the Golan Heights. The Golan trajectory provides the operational template. Each year of occupation hardens the status quo.

B. Trajectory 2: Protracted Insurgency

This trajectory operates simultaneously with Trajectory 1. **Hezbollah's shift to dispersal tactics and construction of defensive harassment lines activate against the holding force the moment the advance halts.** The IDF estimates hundreds of Radwan fighters operate in small cells across approximately 200 occupied villages. Daily IED, ATGM, and drone attacks against IDF forces proceed for 6 to 18 months. The IED introductions on March 19 and March 29 provide the tactical template. FPV drone innovations, including fiber-optic variants that resist electronic jamming, add a new dimension to the insurgent toolkit. The IDF suffers a slow bleed of casualties while holding static positions. Israeli intelligence assessed that Hezbollah is actively pursuing the abduction of IDF soldiers to generate leverage. The Merkava kills at al-Tayba and Qantara prove Hezbollah retains effective anti-armor capability against holding positions.

C. Trajectory 3: Expanded Invasion Beyond the Litani

A strategic Hezbollah attack using precision-guided munitions against Haifa port, Ben Gurion Airport, or the Israeli power grid triggers Israeli escalation beyond the Litani line. If operations at Zahrani depth prove insufficient, the IDF expands to the Sayniq/Awali line. The Ashkelon strike at 200km and the Nasrallah missile hit on the Bazan refinery demonstrate Hezbollah retains the capability to trigger this pathway. Expansion to the Awali would bring IDF forces to the Sidon outskirts and produce a humanitarian catastrophe on the scale of 1982. The constraining factors are Zamir's manpower warning, Washington's sensitivity to oil price shocks, and Hezbollah's current posture of insurgency preparation. If UNIFIL casualties occur during IDF operations, Article 5 discussions among troop-contributing NATO nations could trigger the removal of the last international observer layer, eliminating a restraint on expanded operations.

ANALYTICAL ASSESSMENT

These trajectories are layered because each contains the conditions that generate the next. **A frozen buffer produces the insurgency because Hezbollah cells in 200 villages do not demobilize when the advance stops. The insurgency produces the escalation risk** if a successful attack crosses an Israeli threshold that the political echelon cannot absorb without a campaign-level response. The question is where on the escalation ladder the conflict stabilizes, and whether any actor holds sufficient leverage to arrest the upward momentum before the next threshold is crossed.

STRATEGIC ANALYSIS

LEBANON UNDER SIEGE

The Humanitarian Dimension

March 2026

KEY JUDGMENTS

1. The formal shelter system has reached a functional saturation point of 97% occupancy, leaving **zero margin for additional large-scale displacement shocks**.
2. An 87% gap exists between the formal shelter population and the total estimated 1 million+ displaced persons, **creating an invisible humanitarian crisis dependent entirely on deteriorating host community absorption**.
3. The humanitarian system south of the Litani has **functionally collapsed following the seizure of its last hospital** and the systematic destruction of all six primary bridge crossings.
4. Host community friction has transitioned from passive reluctance to **active sectarian-charged confrontation**, exemplified by the "camp" framing of the Karantina shelter.
5. The destruction of the Al-Qard al-Hassan network has **removed the primary financial floor for hundreds of thousands of families**, creating a vacuum no state or international institution is currently equipped to fill.
6. A reverse migration of 189,000+ persons to Syria indicates that the **humanitarian environment in Lebanon is now perceived as higher-risk than post-war Syria**.

CENTRAL QUESTION

What is the actual state of Lebanon's humanitarian and infrastructure system as of March 29, and what are the realistic collapse thresholds?

I. DISPLACEMENT SCALE, GEOGRAPHY, AND TRAJECTORY

The displacement crisis generated by the March 2026 escalation is the **largest internal population movement in Lebanon since the 2006 war**, and it surpassed that conflict's displacement figures within its first week. By March 29, self-registered IDPs with the Ministry of Social Affairs exceeded 1 million, while the formal shelter system housed approximately 136,262 persons across 663 collective sites.

The gap between these two figures, approximately 87%, is the defining feature of the humanitarian situation. It means that **for every displaced person in a formal shelter, roughly seven others are outside the system entirely**. They are absorbed by host families, squeezed into rental markets, or sleeping in vehicles, mosques, and open spaces.

A. Displacement Scale and Formal Shelter Trajectory

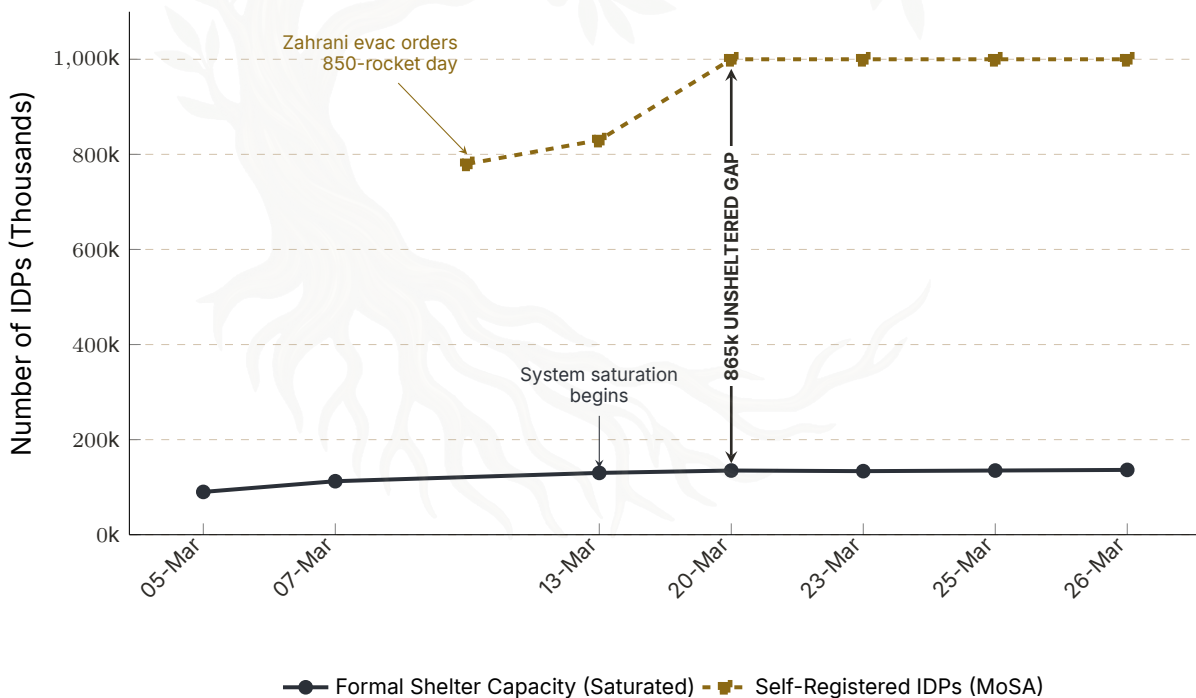
The formal shelter trajectory progressed through four distinct phases.

- **Initial shock period (March 2 to 6):** Approximately 90,000 IDPs entered 420 shelters as evacuation orders covered 53 southern villages and Dahieh.
- **March 7 to 13:** The count rose to 130,000 across 606 shelters, with occupancy reaching 94%.
- **March 14 to 20:** Saw 135,000 IDPs in 637 shelters at 96% occupancy.
- **March 25 to 27:** The system held 136,262 persons in 663 shelters at 97% occupancy.

The **decelerating growth rate in formal shelters does not indicate that displacement is slowing. It indicates that the system is saturated.** Authorities continuously opened new sites throughout the period, adding 243 shelters in 25 days, but each new site filled immediately upon activation.

Date	Shelter IDPs	Shelters	Occupancy	Self-Registered IDPs
Mar 5	~90,000	420	—	—
Mar 7	112,525	514	—	—
Mar 13	~130,000	606	94%	830,000+
Mar 20	~135,000	637	96%	1,000,000+
Mar 27	136,262	663	97%	1,000,000+

Figure 1: Displacement Scale vs. Available Shelter Capacity



The displacement is geographically concentrated in Beirut and Mount Lebanon, which host the vast majority of collective shelter IDPs. Secondary concentrations exist in Saida, Tripoli, and Akkar. **South of the Litani is functionally emptying, not absorbing.** Israeli evacuation orders expanded in geographic waves. These included Dahieh and the border south from March 2 to 6, central Beirut and the area south to the Zahrani River from March 12 to 13, the Nabatiyeh ridgelines from March 16

to 20, and Tyre city and its coastal corridor on March 24. Seven southern Beirut districts received orders the same day. By March 26, OCHA Flash Update #12 recorded that Israeli evacuation orders covered approximately **1,470 km², or 14% of Lebanon's total territory**.

Secondary displacement became the dominant pattern from week 2 onward. Families displaced from the south to Beirut encountered strikes in Dahieh, moved to central Beirut (Raouche, Nouairi), faced strikes there, and moved again to Akkar or Mount Lebanon. Each cycle stripped remaining resources. The pattern was structural. **Israeli air operations followed the displaced population into areas previously perceived as safe**, destroying the concept of urban refuge. This forced repeated flight.

ANALYTICAL ASSESSMENT

The actual crisis is the 870,000+ persons outside formal shelters. Their absorption depends entirely on host family willingness, rental market capacity, and informal networks. All three are deteriorating under documented social tension pressures. A single large-scale trigger event, such as the execution of the Tyre evacuation at Dahieh-scale intensity or a major Dahieh strike, would push 40,000 to 60,000 additional IDPs into a system with **zero absorption margin**.

II. BORDER TOWN ERASURE: PERMANENT VS. TEMPORARY UNINHABITABILITY

The distinction between towns that will recover and towns that will not hinges on infrastructure destruction rather than combat damage alone. The military operations documented in Report 1 produced a spectrum of physical destruction across southern Lebanon that ranges from repairable strike damage to total structural elimination.

A. Physical Erasure vs. Combat Damage

At the far end of the spectrum, Qantara village was reported destroyed on March 26, consistent with the IDF advance along the Taybeh-Qantara axis. **Systematic demolition operations reduced the town centers of Ayta al-Shaab and Meiss el-Jabal to rubble**. Pre-war destruction data from Kfar Kila alone recorded more than 1,300 structures and 133 acres of orchards destroyed between September 2024 and January 2025; the March 2026 campaign compounded this baseline. Towns subject to systematic ground-level demolition face **multi-year reconstruction timelines**. Towns that sustained air strikes but no ground demolition (Nabatiyeh, Bint Jbeil prior to IDF entry) remain recoverable if the occupation ends, though the timeline depends on access, which currently does not exist.

B. Litani Bridge Destruction Campaign

The six primary Litani bridge crossings were destroyed or severely damaged in sequence:

1. Zararieh was struck on March 13
2. Khardali on March 14 (access roads targeted)
3. Qasmiyeh between March 17 and 20
4. Qaa'qaaiyeh al-Jisr on March 20
5. Dlafy/Delaffi was struck twice on March 23 and 24. It is the largest bridge in the south.
6. Qantara was destroyed with the village.

This campaign converted the entire area south of the Litani from a combat zone with restricted access into isolated territory. **An estimated 150,000 people south of the river lost all reliable north-south movement routes**. Reconstruction of six major Litani crossings is a 12 to 24 month minimum engineering project. The isolation persists long after any ceasefire.

Phosphorus-type artillery fire on Yahmur (March 26) damaged agricultural land and water supplies. This introduces a contamination dimension to the uninhabitability calculus. Dahieh, home to an estimated 400,000 residents before the escalation, had 50 to 70% of its population flee by March 6 and continued to sustain daily strike waves through March 29. **It is uninhabitable for the duration of the conflict** and will require months of clearance and reconstruction.

ANALYTICAL ASSESSMENT

The humanitarian consequence is **permanent displacement for communities in the demolition zone and prolonged displacement for communities in the strike zone**. No return pathway exists for the inhabitants of towns that have been physically erased, and no timeline for return exists for those whose towns are occupied. The bridge destruction ensures that even a ceasefire does not produce immediate access to the south.

III. SECTARIAN DISTRIBUTION OF DISPLACEMENT

The displacement is disproportionately Shia. The evacuated territories, southern Lebanon, Dahieh, and parts of the Bekaa, are predominantly Shia. The IDP population reflects this demographic reality. This is not a finding that requires interpretation; it follows directly from the geography of the conflict.

A. Demographic Reality and Soft Segregation

Host community absorption follows sectarian geography with predictable friction. Shia IDPs concentrate in Beirut's southern suburbs (under bombardment), Akkar (Sunni-majority north), Mount Lebanon (mixed Christian-Druze), and the Saida corridor (Sunni-majority south coast). From week 1 onward, landlords in Christian and Sunni areas vetted tenants for political affiliations, refusing anyone with suspected Hezbollah connections on the grounds that their buildings would become Israeli targets. **This created a soft form of sectarian segregation. It concentrated displaced Shia families in zones simultaneously under strike pressure.**

The UNDP Tensions Monitoring System documented an escalating pattern across the four-week period:

B. Week 1 (March 2 to 6)

Localized Screening

Localized screening measures appeared alongside documented rejection of displaced Shia families by some host communities.

C. Week 2 (March 6 to 13)

Regulatory Restriction

Produced explicit calls to evacuate or limit hosting of IDPs in Christian-dominant border villages: Klaiaa, Marjayoun, Rmeich, and Alma Chaab. Public calls for IDP relocation extended to Aramoun (Aley) and Meri (Hasbaya). Youth groups in Michmich (Akkar) and Beddaoui (Tripoli) cautioned against hosting displaced populations. In the Bekaa, **landlords replaced existing IDP tenants with higher-paying incoming IDPs.**

D. Week 3 (March 14 to 20)

Physical Confrontation

Crossed from passive resistance to physical confrontation. A violent clash erupted in Khalde on March 17 between host community members and IDPs, followed by calls to relocate displaced populations. An armed clash between IDPs in Naccache (Metn) on March 19 drew local blame directed at the municipality for hosting displaced persons in the first place. **Community watch groups in Keserwan began recruiting youth.** This development indicates a shift toward community-based self-protection. It reinforces identity boundaries and could encourage vigilantism.

E. Week 4 (March 21 to 27)

The Karantina "Camp" Flashpoint

Consolidated the pattern. The reported establishment of a large IDP shelter in Karantina became the central flashpoint. **The "camp" framing triggered immediate association with the 1976 Karantina massacre and generated politically and sectarian-charged rhetoric** that extended well beyond capacity concerns. On March 24, anti-IDP rhetoric and a clash between IDPs and host community members occurred in Jounieh following the fall of missile debris. By March 27, municipal and informal security measures in Ain El Remmeneh (Baabda) were contributing to tensions between residents and displaced persons. Restrictive measures imposed on displaced Syrians during Eid in Bissariye (Saida, March 23) demonstrated that inter-communal friction extended beyond intra-Lebanese dynamics. A designated collective shelter for Syrians in the North closed on March 18 following community pressure.

Non-sheltered IDPs in Beirut refused transfer to the North and Bekaa due to security and inter-communal concerns. This indicates that available alternatives were not perceived as socially or physically acceptable. The displacement options available to Shia IDPs were narrowing from both directions: **host communities hardened against them, while the areas willing to absorb them were simultaneously under bombardment.**

ANALYTICAL ASSESSMENT

The trajectory is structured, not random, and it accelerated at each stage. What began as individual landlord decisions in week 1 had become community-organized rejection by week 4. The mechanism is consistent: a displaced population that is overwhelmingly Shia enters host communities across Lebanon's sectarian mosaic, and **each interface generates friction proportional to the demographic distance between the two groups.** The Karantina "camp" framing is the clearest example of how this friction activates historical memory. The analytical finding is that the displacement pattern is **producing a de facto sectarian re-sorting of Lebanon's population.** Its trajectory points toward hardening sectarian boundaries. These boundaries will outlast the conflict and define the post-war political geography.

IV. MEDICAL SYSTEM: FUNCTIONAL, DEGRADED, AND COLLAPSED ZONES

The medical system across Lebanon as of March 29 operates in three distinct zones, differentiated not by administrative designation but by functional capacity.

A. Collapsed Zone: South of the Litani

Medical coverage ceased to function as an integrated system by week 4. Israeli forces seized Meiss el-Jabal hospital on March 27, **eliminating the last functioning medical facility south of the Litani in the central sector.** Bahman Hospital and Rasul al-Azam Hospital in Dahieh had been evacuated by March 6. The destruction of all six Litani bridges severed casualty evacuation routes. All medical emergencies south of the Litani must now route to Tyre or Sidon, both of which are under IDF strike pressure. The Alfa mobile network went down in Marjayoun district during week 3 and was not restored. This impairs medical coordination and emergency communication. **For the estimated 150,000 persons isolated south of the Litani, there is no medical infrastructure.**

B. Degraded Zone: Tyre to Sidon to Nabatiyeh corridor

Hospitals in this corridor remain operational but under severe strain. **Surgical capacity degraded to 70 to 80% staffing by mid-March,** and that degradation was not reversed. Tyre itself became subject to evacuation orders on March 24, placing the medical anchor for the southern theater under direct military pressure. The corridor is the last functional medical zone between the Litani and Beirut; **its loss would extend the collapsed zone northward by 40 kilometers.**

C. Stressed Zone: Beirut

AUBMC and Rafik Hariri University Hospital operated at maximum surgical capacity. Blood and trauma supply shortages appeared in week 3. Hospitals throughout the south and Bekaa relied entirely on generators for power, and Beirut institutions faced the same dependency as grid reliability deteriorated.

D. Systematic Targeting and Cumulative Toll

The cumulative toll on healthcare workers is severe. WHO documented 27 attacks on healthcare by March 14, rising to **64 attacks by March 23**. The Ministry of Public Health, via the UNDP Tensions Pulse, reported 42 healthcare workers affected as of March 25. Cumulative figures through March 23 record 51 health workers killed and 91 injured. On March 28, nine additional paramedics were killed. The pattern is **systematic targeting of emergency medical services in the south**.

WHO dispatched 32 tons of medical supplies. The pre-war pharmaceutical buffer of approximately three months is rapidly depleting under increased trauma demand and supply chain disruption. The casualty toll stood at 1,142 killed (122 children, 83 women) by March 27. MoPH does not separate combatants from civilians. The demographic breakdown is 92% Lebanese, 4% Syrian, 2% Palestinian.

ANALYTICAL ASSESSMENT

The binding constraint on the medical system is not hospital beds. It is surgical teams, blood supply, and generator fuel. If diesel supply to Beirut hospitals is interrupted for 48 to 72 hours, surgical capacity collapses. The system south of the Litani has already crossed that threshold; it is not degraded but collapsed.

V. SUPPLY CHAINS: FUEL, FOOD, PHARMACEUTICALS

The supply chain crisis is not three parallel shortages. It is a single interdependent system in which each failure amplifies the next. The sequence operates as a loop: bridge destruction severs distribution routes; severed routes prevent fuel delivery; fuel shortages disable hospital generators and civilian transport; disabled transport prevents food and pharmaceutical distribution to the populations that need them; and those populations cannot evacuate because the bridges are destroyed. The loop is circular, and by March 29 it was tightening.

A. Fuel: The Binding Constraint

Gasoline prices rose more than 25% and diesel more than 50% since March 2, driven by both the global Hormuz crisis (Brent crude above \$100) and domestic supply destruction. **The al-Amana fuel station network was systematically targeted**; at least 11 stations were struck by March 25, with additional hits on March 28. Al-Amana served both Hezbollah logistics and adjacent civilian refueling needs. Its destruction did not merely degrade Hezbollah's supply chain; it removed civilian refueling capacity across the south. Black market pricing emerged in Beirut by week 2. Service taxis set their own fares at 300,000 LBP. Southern residents could not refuel vehicles for evacuation or food transport. **Lebanon has no strategic fuel reserve. Hospital generator deliveries are hand-to-mouth.** The connection between fuel supply and hospital survival is not theoretical; it is the mechanism by which the medical system transitions from "stressed" to "collapsed."

B. Food: Immediate and Medium-Term Timelines

Food supply is degrading on two timelines. The immediate timeline: the WFP food basket rose 3% on war onset against a baseline where 17% of the population was already acutely food insecure. Food protests erupted in Tripoli (week 2) and some Beirut shelters (week 3). Beirut Port remains the primary lifeline, but **the Syrian land border has been functionally closed for strategic goods since March 5, severing approximately 70% of non-perishable goods imports**. The medium-term timeline is more consequential: the reverse migration of 189,000+ Syrian workers is draining the Bekaa's agricultural labor force before the May to June harvest cycle. This will not produce food shortages in March, but its effects will compound the supply constraint in the weeks that follow.

C. Pharmaceuticals: Availability vs. Access

Pharmaceutical supply faces the same convergence. The pre-war three-month hospital stock is depleting under mass-casualty demand that it was never designed to absorb. WHO dispatched 32 tons of medical supplies, partially offsetting the drawdown. But logistical routes to the south are severed by bridge destruction, meaning the supplies that exist cannot reach the populations that need them. **The gap between supply availability in Beirut and supply access in the south is the pharmaceutical system’s defining failure.**

ANALYTICAL ASSESSMENT

The system has not collapsed. But the **fuel-transport-medical loop has tightened to the point where a single additional shock (such as airport disruption or a second fuel price spike) closes it entirely.** Each element of the loop is degrading simultaneously, and the degradation in each accelerates the degradation in the others.

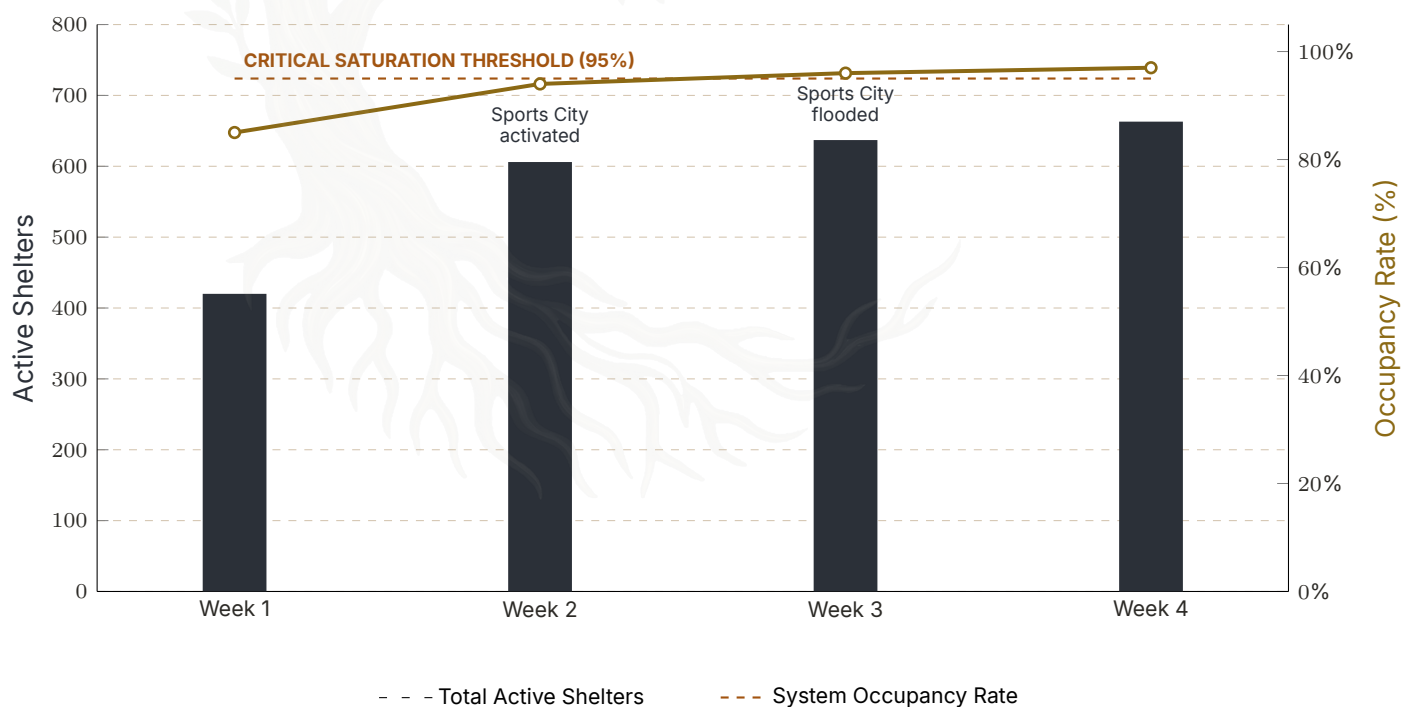
VI. SHELTER SYSTEM: CAPACITY, QUALITY, AND GOVERNANCE

The shelter system is not failing. It is being actively managed through continuous expansion. But it is managing at the margin, and the margin is zero.

A. System Saturation at the Margin

At 663 collective shelters and 97% occupancy as of March 27, authorities have maintained a pace of site activation (243 new sites in 25 days) that has so far prevented formal collapse. **Each new site fills immediately. The system’s capacity to absorb additional shocks is exhausted.** The concrete trigger for system failure is the execution of the Tyre evacuation at Dahieh-scale intensity: 40,000 to 60,000 new IDPs with no prepared reception capacity. Secondary triggers include a major Dahieh strike producing a new displacement wave, or the collapse of conditions at a large site forcing internal displacement from shelters themselves.

Figure 2: Shelter Network Stress and Functional Collapse



B. Internal Governance and Conditions

Conditions at major sites are producing their own displacement pressure. Sports City (Cite Sportive) in Beirut, one of the largest collective shelters, was described as uninhabitable, with overcrowding and absent services. Flooding at the Sports City and in street tents occurred during harsh weather in week 3. Tent quality and weather protection were raised as concerns across exposed sites. **If conditions at primary shelters collapse, secondary displacement from failing sites compounds the crisis** with no contingency plan documented.

Internal governance challenges within shelters intensified across the reporting period. Food hoarding by some shelter managers was documented. Selective aid distribution and personal disputes between IDPs emerged. Protests over perceived food shortages occurred in some Beirut shelters, while other sites reported surplus. An article circulating on March 18 alleged unethical behaviors by some shelter managers. Tensions between IDPs, shelter management, and humanitarian actors rose in Beirut and West Bekaa. A shelter in Rachiin (Zgharta) closed, fueling intra-Lebanese tensions. Violent clashes between IDPs were reported again in Aramoun (Aley).

C. Party-Led Shelter Management and State Competition

A significant portion of the collective shelters (often public schools and municipal buildings) are de facto managed by Hezbollah and the Amal Movement through affiliated civil society organizations, including the Islamic Health Authority, the Al-Risala Scout Association, and local party committees. This parallel infrastructure allows the parties to maintain patronage and constituency cohesion despite mass displacement.

This party-led shelter management creates three distinct frictions. First, it produces competition with the state's Disaster Risk Management Unit and Ministry of Social Affairs, which attempt to assert sovereign control over aid distribution. Second, it complicates coordination for international NGOs and UN agencies whose neutrality mandates restrict engagement with sanctioned entities. Third, **it heightens security anxieties among host communities who fear that party-affiliated shelter management transforms the sites into potential Israeli military targets.**

The competition became visible at the Karantina hub, where aid distribution disputes emerged between government and Hezbollah-aligned distribution networks. The government insisted on direct transfer to eligible displaced persons without intermediaries, a small but operationally significant assertion of state control over humanitarian flows. This represents active state-Hezbollah competition over the management of the displaced population, and it is a dynamic that will intensify as the crisis extends.

ANALYTICAL ASSESSMENT

The MoSA self-registration platform, launched in week 2, extended the state's visibility over displacement outside shelters. But visibility is not control. **The 870,000+ IDPs outside formal shelters depend on host community willingness, rental market capacity, and family networks.** All three are deteriorating.

VII. FINANCIAL SYSTEM: SALARIES, CURRENCY, AND ECONOMIC INDICATORS

The financial pressures produced by the conflict are creating a stratified crisis that operates across three distinct economic layers simultaneously.

A. The Formal Economy and Public Sector

The formal economy has shut down. Hotel occupancy collapsed from a projected 80 to 90% (the Eid/Easter peak, the highest annual tourism revenue period) to 7 to 11%. Gulf exports are virtually frozen, as confirmed by the Association of Lebanese Industrialists. **The tourism sector's total revenue loss removes one of the few remaining foreign currency inflows into an economy already in multi-year depression.**

B. The Informal Shia Economy and AQAH Destruction

The informal Shia economy lost its institutional base. The coordinated strikes on Al-Qard al-Hassan branches on March 9 and 10 **destroyed the primary microsavings and microfinance mechanism for hundreds of thousands of Shia families**. AQAH is not a bank in the Western sense; it is the savings mechanism, small business loan provider, and social safety net that constitutes the economic floor for its community. Over 30 branches were destroyed across the campaign. Specific office suites and server rooms were hit. This indicates deep intelligence penetration of AQAH's physical footprint. No government equivalent exists. No international institution has the architecture to replace it. The NSSF emergency measures (allowing displaced citizens to receive hospital treatment regardless of registration district) address healthcare access but not the broader financial collapse. **The destruction of AQAH is not a banking crisis; it is the removal of the community's financial floor.**

C. Public Sector Strain

The public sector faces its own disruption. Civil servant salary payments were delayed during week 4. The Finance Ministry announced disbursements for Saturday March 27, confirming the delay was real and resolved only under pressure. The pre-war public sector salary adjustment plan had already been deferred. UN agencies are cutting Lebanon budgets, a structural signal of donor fatigue pre-dating the current crisis.

D. The Displacement Tax and Rental Market

The rental market has become a displacement tax on the most vulnerable. Rent prices surged up to 500% in displacement-affected areas. Reports documented demands of \$2,000 per month with multi-month upfront payment. In the Bekaa during week 2, landlords replaced existing IDP tenants with higher-paying incoming IDPs. **This creates a system where the displaced compete against one another for housing**. The Lebanese pound remained under quiet pressure throughout the period, with no Central Bank statement issued.

ANALYTICAL ASSESSMENT

These three economic layers interact. The formal economy's collapse removes the tax base and foreign currency inflows that fund state salaries. **The AQAH destruction removes the informal economy's floor, concentrating financial desperation in the same Shia communities absorbing the physical displacement**. The salary delays threaten the state workforce that manages both. If health ministry staff, social affairs workers, or interior ministry personnel stop reporting to work because salaries are not paid, the humanitarian management system fails from within. The state's capacity to manage the crisis depends on a workforce that the state is struggling to pay, funded by an economy that the war is dismantling.

VIII. CROSS-BORDER DISPLACEMENT AND REVERSE MIGRATION

The reverse migration from Lebanon to Syria is the most direct severity indicator available. People who survived Syria's civil war and chose Lebanon as refuge are now choosing to return to a country they fled.

A. Scale and Acceleration of Reverse Migration

The IOM Displacement Tracking Matrix recorded the acceleration: 65,000+ crossed from Lebanon to Syria by March 13, rising to 125,000+ by March 17, 130,000+ by March 24, and **189,000+ by March 26**. The flow tripled in 26 days. The acceleration correlates with the ground invasion launch (week 3) and the systematic isolation of the south through bridge destruction (week 4).

B. Demographic Composition and Needs

The demographic composition is approximately 95% Syrian and 5% Lebanese. Most are families and young men who had traveled to Lebanon for work. IOM emergency mobility tracking recorded 82,000+ arrivals across hundreds of locations in Syria. This demonstrates widespread geographic dispersal rather than concentration in border areas. Reported needs center on cash assistance, food, and shelter. Most rely on temporary accommodation with relatives.

The 7,000+ Lebanese nationals crossing to Syria represent the most extreme displacement cohort: Lebanese citizens fleeing their own country to a neighbor still recovering from civil war. This figure, small in absolute terms, is analytically significant as a measure of perceived severity.

The agricultural labor vacuum this migration creates in the Bekaa is a medium-term food security risk. Syrian workers constitute a substantial portion of the Bekaa's agricultural labor force. Their departure before the spring planting and summer harvest cycle will produce reduced agricultural output in the May to June window. This is not an immediate crisis, but it compounds the food supply trajectory described in Section 5.

ANALYTICAL ASSESSMENT

Border crossings remain open for human movement despite functional closure for strategic goods. **The asymmetry, people can leave but supplies cannot enter, captures the humanitarian situation in a single observation.**

IX. REALISTIC SYSTEM FAILURE TIMELINE AND TRIGGER EVENTS

The humanitarian system as of March 29 is not in failure. It is in the last phase before failure, with zero margin for additional shock. The following trigger events are ranked by probability and impact.

A. 1. Tyre evacuation execution at Dahieh-scale intensity

Probability: high, if the ground campaign continues along its current trajectory. The Tyre evacuation orders issued March 24 cover approximately 60,000 residents, but confirmed large-scale departure had not materialized by March 29. Populations are frozen in a calculus where movement carries lethal risk equal to staying. If the IDF executes a strike campaign in Tyre comparable to the Dahieh pattern, **40,000 to 60,000 new IDPs enter a 97%-full shelter system.** Timeline to system failure: 48 to 72 hours after execution.

B. 2. Diesel supply interruption to Beirut hospitals

Probability: moderate, contingent on fuel price trajectory and al-Amana network destruction ripple effects. Hospital generator reserves are hand-to-mouth. The destruction of Hezbollah-linked fuel infrastructure removed refueling capacity that also served adjacent civilian needs. **Timeline: 48 to 72 hours from interruption to surgical capacity collapse in Beirut.**

C. 3. Completion of Litani bridge destruction

Probability: high; five of six named bridges are already struck. The sixth, Qantara, was destroyed with the village. Completion converts the south from a combat zone with restricted access to fully isolated territory. **Humanitarian access to the south ceases entirely.** Timeline: humanitarian access ceases within days.

D. 4. Airport disruption

Probability: low to moderate, but highest-consequence single event. Rafic Hariri International Airport continues skeletal operations; its director stated that maintaining operations is a fundamental pillar of national resilience. A strike or credible threat that closes the airport completes Lebanon's logistical isolation. **Timeline: emergency within 14 to 21 days, humanitarian catastrophe within 21 to 28 days.**

E. 5. Civil servant salary payment failure

Probability: moderate, if the war extends past April. The March 27 disbursement resolved the immediate delay, but the structural pressure remains. If the state cannot pay its humanitarian management workforce, response capacity degrades from within. **Timeline: 2 to 4 weeks to visible impact on response capacity.**

F. 6. Large-scale kinetic sectarian incident at a displacement center

Probability: moderate, with the trend line rising through weeks 1 to 4. The pattern escalated from passive vetting (week 1) to regulatory restriction (week 2) to violent clash in Khalde and armed clash in Naccache (week 3) to Karantina flashpoint and Jounieh clash (week 4). An organized expulsion or a shooting could shift the crisis from displacement management to internal security. **Timeline: immediate political impact; LAF redeployment to internal security reduces border management capacity.**

ANALYTICAL ASSESSMENT

The most dangerous trajectory is the simultaneous unfolding of triggers 1 through 3: a ground invasion producing mass displacement while bridge destruction isolates the south and fuel disruption degrades hospital capacity. As of March 29, triggers 2 and 3 are partially realized. The system is in the zone where a single additional shock activates cascade failure.

X. SCENARIOS

These scenarios are not mutually exclusive. They represent layers of humanitarian reality that can coexist. Controlled degradation is the current state. Cascade failure is the proximate risk within it. Sectarian fracture can occur independently of or simultaneously with either.

A. Scenario A: The Current State: Controlled Degradation

Trigger: No single large-scale shock event has occurred.

- The shelter system holds at 97% occupancy through continuous site additions.
- The medical system stabilizes in Beirut and the Sidon-Tyre corridor while remaining collapsed south of the Litani.
- Fuel supply is disrupted but not exhausted; hospital generators receive hand-to-mouth deliveries.
- Displacement normalizes into a semi-permanent condition for Shia border communities. There is no return pathway for towns subject to systematic demolition.
- Social tensions at displacement centers remain elevated but contained below the threshold of generalized violence.

This is not stability. It is the sustained absence of a trigger event. Every underlying trend (occupancy compression, fuel price trajectory, social tension escalation, rental market exhaustion) is deteriorating. Controlled degradation persists only as long as no single additional shock overloads the system's zero margin.

B. Scenario B: The Proximate Risk: Cascade Failure

Trigger: Operating within the controlled degradation state, one high-magnitude shock event closes the interdependency loop described in Section 5. The most probable triggers: execution of the Tyre evacuation at Dahieh-scale intensity (40,000 to 60,000 new IDPs into a system with no absorption capacity); a sustained interruption to diesel supply reaching Beirut hospital generators; or a major strike on a concentrated IDP site.

- The cascade sequence: displacement surge overloads the shelter system within 48 to 72 hours; hospital generator fuel runs out; surgical capacity collapses.
- Patients cannot be evacuated because bridges are severed and the airport operates on a skeletal schedule.
- **The interdependency loop closes:** no fuel delivery because bridges are destroyed, no bridge repair because engineers are displaced, no hospital treatment because generators are offline.
- **Timeline from trigger to breakdown of organized humanitarian response: 10 to 14 days.**

The transition from controlled degradation to cascade failure requires a single shock event. As of March 29, two of the six trigger events identified in Section 9 are partially realized.

C. Scenario C: The Governance Risk: Sectarian Fracture

Trigger: This trajectory operates on a different axis from infrastructure failure. A large-scale kinetic incident at a displacement center (a shooting, the identification of a Hezbollah-linked individual among IDPs, an organized expulsion) triggers a generalized hardening of host community rejection across multiple sites simultaneously.

- The Karantina, Aramoun, Khalde, and Jounieh pattern generalizes.
- Shia IDPs concentrate in a shrinking number of accepting areas (Beirut west, Bekaa), accelerating overcrowding in zones already under strike pressure.
- **The humanitarian system fragments along sectarian lines**, with each community retreating into self-organized response. The state loses its coordination function.
- **Outcome: Humanitarian collapse arrives through governance failure rather than infrastructure failure.** It arrives faster and with less warning than cascade failure.

ANALYTICAL ASSESSMENT

Sectarian fracture can occur independently of cascade failure. It can also occur simultaneously with it, compounding infrastructure collapse with governance collapse. **The week 1 to 4 escalation pattern in host community friction (Section 3) is tracking toward this trajectory without any additional trigger;** the question is whether the pattern stabilizes at the current level or crosses the threshold into generalized violence.

STRATEGIC ANALYSIS

LEBANON UNDER SIEGE

Political-Sectarian Dimension

March 2026

KEY JUDGMENTS

1. The Lebanese state established an unprecedented record of sovereignty declarations while possessing **near-zero coercive capacity to enforce them**. This asymmetry between maximalist rhetoric (weapons bans, ambassador expulsions) and minimal enforcement (25 arrests, skeletal checkpoints) defines the institutional trajectory of the four-week conflict.
2. Speaker Nabih Berri successfully deployed **extra-constitutional pressure to veto a cabinet decision**, effectively reversing the expulsion of the Iranian ambassador. While constitutional authority resides with the premiership, effective veto power remains anchored in Berri's ability to mobilize Shia institutional solidarity.
3. The Shia community is absorbing a concentrated material and psychological burden through physical displacement, the decapitation of the Al-Qard al-Hassan (AQAH) financial system, and the shattering of the Bekaa's strategic insulation. **A private divergence is growing between public solidarity with the resistance and private resentment toward the Iranian priority** driving the conflict.
4. Christian political blocs have converged on a sovereignty-restoration narrative that explicitly warns against Hezbollah turning its weapons inward. The invocation of "May 7" red lines by multiple actors indicates a **preemptive assessment that internal coercion is a plausible Hezbollah post-war strategy**.
5. The absence of unified Sunni leadership has transformed **PM Najib Salam into the de-facto sectarian anchor**. Any collapse of the Salam government would remove the community's sole institutional representative, triggering a destabilizing political vacuum.
6. Walid Jumblatt's 96-hour silence following the Bchamoun strike signals a shift toward **strategic ambiguity as the Druze community prioritizes the Lebanese Armed Forces** over parliamentary mediation as its primary security anchor.
7. Israel is creating **irreversible political-sectarian facts on the ground through systematic demolition of Shia border villages** and the establishment of strategic observation posts. This demographic reshaping of southern Lebanon creates a post-war asymmetry where spared Christian and Druze communities will prioritize stability while displaced Shia communities demand reconstruction.
8. The destruction of the AQAH network has created a **catastrophic financial vacuum** for hundreds of thousands of Shia families. Whoever fills this vacuum, whether the state, Hezbollah, or international actors, will secure the community's primary economic and political loyalty in the post-war order.

CENTRAL QUESTION

What is the actual state of Lebanese political institutions, sectarian alignments, and economic capacity as of March 29, 2026?

I. THE MARCH 2ND CABINET SESSION, THE POLITICAL-SECTARIAN STARTING POINT

The March 2 cabinet session is the founding political act of the conflict's domestic dimension. It set the terms of every subsequent institutional confrontation.

The cabinet faced a structural trap. Designating Hezbollah as a terrorist organization would trigger Shia ministerial resignations, collapsing the government from within. Refusing to act would trigger Lebanese Forces resignations, collapsing the government from the sovereignty flank. The "third path" grounded the prohibition in constitutional sovereignty, declaring that "the decision of war and peace rests solely with the State," rather than adopting a terrorism designation. This formula **criminalized Hezbollah's military activities as an illegal usurpation of state prerogative while allowing Shia ministers to remain in the cabinet** without voting to designate their own community's dominant political-military force as terrorist.

The formula worked initially because it separated the legal question (is Hezbollah's military arm operating illegally?) from the political one (is Hezbollah a terrorist organization?). Health Minister Rakan Nassereddine, a Shia minister, stated: "no one holds its resistance accountable as we have." This framing allowed Shia institutional participation to continue while asserting a sovereignty principle that, in theory, bound all parties.

Speaker Nabih Berri's endorsement acted as the critical enabler. As Amal movement leader and the traditional Shia political interface with the state, his backing gave Shia ministers the political cover necessary to vote for a framework that their constituents would increasingly view as an attack on the resistance. The cost of this enabling role was not immediately visible: **Berri validated a framework that his own constituency's experience of the war would gradually delegitimize.**

The pattern established on March 2 was "constitutionally creative, operationally empty." Hezbollah violated the ban within hours. By March 6, PM Salam was doubling down on the sovereignty framing while the enforcement gap widened daily. The cabinet had passed the most ambitious assertion of state authority over Hezbollah in the republic's history, and it possessed no instrument to make the assertion operational.

ANALYTICAL ASSESSMENT

Every subsequent political development in this report traces back to this founding act. The weapons ban's language was maximalist; its enforcement capacity was zero. This **asymmetry between rhetoric and capacity is the defining condition of the Lebanese state's trajectory** for the entire four weeks.

II. THE STATE'S SOVEREIGNTY OFFENSIVE

The Salam government conducted a four-week escalatory sequence of sovereignty declarations. The analytical object is the structural gap between each declaration and the state's capacity to enforce it.

A. Week 1 (March 2 to 8)

The founding act.

The cabinet passed the ban on Hezbollah military activities using constitutional sovereignty language, preserving Shia ministerial participation. PM Salam stated "the decision of war and peace rests solely with the State." Hezbollah violated the ban within hours. The first enforcement actions were minimal: 25 arrests for illegal weapons possession, none of them Hezbollah members; checkpoints established at Aalii, Zahrani, and Messile; two judicial arrest warrants issued against Hezbollah fighters, neither executed. **The enforcement gap was visible from day one.**

B. Week 2 (March 9 to 15)*Escalation under pressure.*

The Justice Minister declared "the resistance doctrine ended in 2000." President Aoun requested a one-month ceasefire on March 13 and pledged to "confiscate all weapons," the most explicit disarmament commitment by any Lebanese head of state since Hezbollah's founding. This pledge became the international community's primary reference point for Lebanese state credibility. In the same week, the National Officers manifesto surfaced on March 12, **publicly announcing that the enforcement instrument would not enforce**. LAF Commander Heikal refused to implement the cabinet ban. Restrictions on Iranian nationals were announced. The gap between declaration and enforcement widened visibly: the state's own military institution had publicly refused to carry out its government's orders.

C. Week 3 (March 16 to 22)*Drift.*

No new major sovereignty declarations were issued. The government held together through the paradox of Hezbollah's continued ban violations occurring with no state response. The LAF repositioned away from border positions without engaging either Israeli or Hezbollah forces. The Justice Ministry opened a criminal case against Secretary-General Qassem.

D. Week 4 (March 23 to 29)*Dual climax.*

The ambassador expulsion was declared on March 24 with a Sunday deadline. Lebanon filed its first formal institutional complaint at the UN Security Council on March 26. Ambassador Ahmad Arafa at the UN received a verbal note from the Foreign Ministry instructing him to formally notify the United Nations of the March 2 cabinet ban and Aoun's negotiations initiative, **converting the domestic political act into a formal international legal record**. The cabinet boycott began on March 26 when Shia ministers, Hezbollah and Amal alike, withdrew from cabinet participation. Ambassador Shibani defied the expulsion deadline on March 29 and remained in Beirut. **The state had made its most ambitious sovereignty assertion and suffered its most complete enforcement failure in the same week.**

The balance sheet is stark. The state enforced: 25 arrests for illegal weapons possession (non-Hezbollah); checkpoints; two unexecuted arrest warrants; restrictions on Iranian nationals; the Justice Ministry criminal case against Qassem; the UN formal notification via the Arafa verbal note. The state declared but could not enforce: weapons ban compliance, ambassador departure, LAF deployment to Hazmieh and Bchamoun, IRGC deportation, weapons confiscation.

The LAF operates as a political constraint rather than a military instrument. Approximately 30% of its personnel are Shia. The National Officers manifesto warned against deployment orders. **Aoun's description of himself as an "impenetrable wall" defending the institution sidelined US-French pressure to remove Commander Heikal**, calculating that a wartime change in command would cause institutional paralysis. The LAF's Phase 2 disarmament plan requires at least four months, making any near-term enforcement timeline structurally impossible.

ANALYTICAL ASSESSMENT

The government's language escalated in ambition precisely as its capacity contracted. Each declaration without enforcement narrowed the space for the next declaration to be credible. By March 29, the Salam government held the **most ambitious rhetoric of any Lebanese government in a generation and the least coercive capacity to back it.**

III. BERRI'S ACTIVE VETO

The analytical object here is not Berri's silence but his successful use of extra-constitutional pressure to reverse a cabinet decision. Berri's trajectory over four weeks moved from enabling the state's sovereignty formula to actively vetoing its most consequential application.

A. Week 1 (March 2 to 6)

Berri's early endorsement of the cabinet formula enabled Shia ministers to stay. A Parliamentary Bureau meeting at Ain al-Tineh showed consensus on parliamentary extension. He occupied the **critical mediating space between the state and Hezbollah**, a position that gave him leverage over both.

B. Week 2 (March 7 to 13)

Berri received direct warnings from Iranian intermediaries that supporting the ban represented "straying from the Resistance axis." He described the war as "lengthy and without clear prospects" and called for return to the November 2024 ceasefire framework. **Hezbollah overruled him.** Sources describe him as "particularly burdened." He began exploring a "unilateral state initiative" to decouple Lebanon from the Iran succession crisis. The divergence with Hezbollah's Iranian-directed strategy was widening, but Berri could not formally break without triggering a Shia schism.

C. Week 3 (March 14 to 20)

The divergence deepened. Hezbollah's baya'a (oath of allegiance) to Mojtaba Khamenei on March 12 **locked the party into the Iranian strategic framework precisely when Berri's constituency demanded a Lebanese-first calculation.** Berri cannot formally break with Hezbollah without fracturing Shia political unity, but he maintains an independent political calculus centered on his own institutional relevance. Jumblatt signaled openness to negotiations only in coordination with Berri, confirming Berri's centrality to any cross-sectarian framework.

D. Week 4 (March 21 to 29)

The decisive week.

The ambassador expulsion declaration on March 24 triggered Berri's public hardening. The sequence is precise. Berri sent a message to Aoun: "This decision cannot pass", demanding cancellation. Sheikh Qablan, who is Amal-adjacent, publicly instructed the ambassador to stay: "We ask the Iranian ambassador not to leave Lebanon." **The Amal parliamentary bloc boycotted the March 26 cabinet session jointly with Hezbollah.** Berri closed his calendar to the Papal Nuncio. Three exit formulas were discussed through back-channels: an Aoun-Berri formula, Egyptian mediation, and a parliamentary resolution. Berri called Iranian FM Araghchi on March 28, framing the conversation as "war and negotiations, no talk of the ambassador," deliberately separating the ambassador question from the war itself. On March 29, Berri's office issued a blanket denial of all statements attributed to him, calling them "completely without basis, in all details." The standard Berri posture is silence, not public correction; issuing a formal denial indicates active management of his positioning.

The result: efforts were underway to convene the cabinet again on Thursday, April 2, with Shia minister participation restored. The ambassador issue would not be raised at that session, confirming that the face-saving formula Berri sought is the **removal of the ambassador question from the cabinet agenda, not its formal reversal.**

One crack appeared in the bloc discipline. Administrative Development Minister Fadi Makki, who is Amal-adjacent, attended the boycotted March 26 session despite personal opposition to the expulsion. He then visited President Aoun and stated: "our only choice is the state and its legitimate institutions." This is the first visible fracture in Shia bloc discipline during the conflict. The boycott's practical failure was not addressed by Al-Manar or pro-Hezbollah channels.

ANALYTICAL ASSESSMENT

The ambassador expulsion episode reveals the actual Lebanese power geometry. Constitutional authority resides with the cabinet. **Effective veto power resides with Berri's ability to mobilize Shia institutional solidarity.** Berri's calculation is independent of Hezbollah's: he is protecting his institutional relevance, not the resistance narrative. The Makki break and the "three exits" search indicate that Berri is seeking resolution on terms that preserve his cen-

trality. The joint boycott shows that Berri and Hezbollah can act in concert when the issue engages Shia solidarity, but Berri managed the ambassador crisis through a separate channel from the war conversation, maintaining an independent line of maneuver.

IV. THE SHIA COMMUNITY, THREE SHOCKS AND A PRIVATE DIVERGENCE

The Shia community absorbed concentrated material and psychological punishment across four weeks. Three distinct shocks define the community's wartime experience. A fourth dynamic, a growing private divergence between public solidarity and private resentment, is operating beneath the surface.

A. Shock 1: Physical displacement.

Over one million displaced persons, overwhelmingly from the south and Dahiyeh, entered a humanitarian system documented in Report 2. Secondary displacement became routine: families displaced from Dahiyeh to central Beirut were displaced again by strikes in Raouche and Nouairi. **Landlord vetting in non-Shia areas created soft sectarian segregation at the individual transaction level**, concentrating displaced Shia families in zones simultaneously under strike pressure. Southern villages fell under IDF control. The medical zone south of the Litani ceased to function after the Meiss el-Jabal hospital seizure.

B. Shock 2: AQAH financial decapitation.

The March 9 to 10 strikes on Al-Qard al-Hassan branches across Beirut, targeting Bir al-Abed, Haret Hreik, the airport road, and Nouairi, were surgical, hitting specific office suites and server rooms. **AQAH was the primary savings mechanism, microfinance provider, and social safety net for hundreds of thousands of ordinary Shia families.** Small business loans, personal savings, and community credit are now rubble. No government equivalent exists. The community's economic floor was removed in 48 hours.

C. Shock 3: Bekaa's insulation shattered.

The Nabi Chit commando operation on March 6 to 7 killed 41 people including four children, conducted for a failed Ron Arad grave excavation. **The Bekaa had been the strategic rear, the one geography where Shia communities maintained distance from the front.** The operation demonstrated that this insulation no longer held. A 90-minute detection lag occurred before Hezbollah engaged the raiding force.

D. The private divergence.

Public anger is directed at Israel. Hezbollah's media office frames long-range strikes as proof of capability. But in private Telegram groups and WhatsApp chains, different questions circulate: "Why didn't we launch long-range strikes earlier to deter destruction of southern villages?" and "Why are we dying for Iran's succession crisis?" **Private resentment toward the "Iranian priority" is growing, but it has not breached the public solidarity frame.** The gap between Hezbollah's universalist resistance narrative ("defending Lebanon") and the community-specific burden (Shia towns occupied, Shia dead counted, Shia savings destroyed) is the fault line that tests the Amal-Hezbollah alliance. Amal is deeply embedded in the state apparatus that must manage the fallout. Hezbollah prioritizes the Iranian strategic imperative.

Iraq deportation conspiracy theories documented on Al-Jadeed and social media are triggering demographic anxiety that extends beyond the immediate military threat. Hezbollah's decision to stop publicly naming battlefield dead (a funeral culture shift) makes comprehensive assessment of community sentiment opaque.

ANALYTICAL ASSESSMENT

The Shia community maintains public solidarity while absorbing concentrated loss. The private divergence is real but not dominant. Sustained Israeli fire volume would reinforce solidarity through the rally-around-the-flag mechanism; continued strikes demonstrating community-

specific vulnerability, particularly AQAH-style targeting, erode it. The true test of Shia bloc cohesion is not ideological but material: when the war ends, the **competition between Amal (leveraging state resources) and Hezbollah (facing financial degradation) to rebuild the devastated constituency** will define the community's post-war trajectory.

V. CHRISTIAN BLOCS, SOVEREIGNTY AS RESTORATION

The Christian political landscape during March 2026 contains multiple actors with distinct positions that converge on sovereignty but diverge on degree. The convergence is the story; the divergence determines what kind of post-war order Christian politics will demand.

A. Geagea and the Lebanese Forces

During Week 1 (March 2 to 8), Geagea convened sovereignty consolidation meetings with Maronite bishops. He framed the March 2 cabinet decision as a historic opportunity: "the first time a Lebanese government has said Hezbollah's military activities are illegal." He publicly praised Salam while privately pressing for enforcement. **The Lebanese Forces entered the war as the most hawkish sovereignty force in the cabinet.** During Week 2 (March 9 to 15), Geagea escalated pressure. His statement, "Until Washington moves, the guns stay pointed," signaled impatience with the enforcement gap. He began building a cross-party sovereignty coalition. A meeting between Geagea and Jumblatt's PSP delegation at Maarab was the first significant cross-sectarian consultation of the war period. During Week 3 (March 16 to 22), The LF legal team explored mechanisms to accelerate parliamentary pressure on Hezbollah arms. Geagea publicly endorsed the UNSC complaint track. He privately pressed Aoun to issue more specific enforcement timelines. LF-adjacent media intensified coverage of AQAH destruction and Shia displacement as confirmation that Hezbollah's war is costing its own community. During Week 4 (March 23 to 29), **The Maarab Conference on March 28 crystallized four weeks of coalition-building.** Geagea convened the full sovereignty coalition, including political parties, independent MPs, ministers, and foreign figures, under the title "To Save Lebanon." The conference final statement was comprehensive. A follow-up committee was formed. The statement declared Hezbollah is operating "under direct Iranian direction," shifting Lebanon "from a sovereign state to a platform serving external projects." Iran was designated "fully responsible at the international, political, and legal levels" while Hezbollah holds "executive responsibility." Reconstruction costs are to be demanded from Iran, not Lebanese taxpayers. The statement called for a special court (national, international, or hybrid) to prosecute responsible parties. On weapons, the language was unambiguous: "an existential threat: there can be no state with two armies." The cabinet was called upon to invoke international forces under UNSCR 1701 paragraph 12 and Chapter VII. The address to the Shia community read: "Our call for the state to assert itself is not directed against you, but to protect you." The final framing: "Lebanon today faces one of two choices: either a state... or no state." Geagea called for Hezbollah to be designated an illegal organization "TODAY" and **positioned Aoun as the legitimate interlocutor for any ceasefire initiative**, separating the president from Hezbollah's war posture while preserving institutional structure.

B. Bassil and the Free Patriotic Movement

During Week 1 (March 2 to 8), The FPM did not publicly endorse or criticize the March 2 cabinet decision. Bassil maintained the Mar Mikhael understanding posture: sovereign state formulas are acceptable, but direct confrontation with Hezbollah is not. During Week 2 (March 9 to 15), Bassil met Patriarch Rai at Bkerke. The FPM framed its position as "national unity over political advantage." When the National Officers manifesto surfaced, FPM offered no public comment. During Week 3 (March 16 to 22), FPM made quiet contact with Berri at Ain el-Tineh. Bridge-positioning became more active as the ground invasion deepened. Strikes reaching Hazmieh, where Bassil's property is reportedly located, concentrated attention on FPM's core geographic constituency. During Week 4 (March 23 to 29), Bassil's position crystallized in two moves. On March 26 to 27 he declared: "Renouncing violence and rejecting internal fighting, considering it a red line that must not be crossed". On March 27 he presented the "Lebanon Protection Proposal" to Patriarch Rai at Bkerke and met Berri at Ain el-Tineh the same day, **positioning FPM as the bridge between the Hezbollah-aligned bloc and the sovereignty bloc.**

The Geagea-Bassil distinction is structurally important. Geagea demands sovereignty maximalism; Bassil demands dialogue and unity. Bassil retains a political relationship with Hezbollah that Geagea does not. The Mar Mikhael understanding has not been formally renounced. **Bassil is hedging: if Hezbollah survives as a political force, FPM needs the relationship intact.**

C. President Aoun

Aoun's trajectory is defined by the tension between his maximalist sovereignty pledges and his institutional management of the LAF crisis. In Week 1, he requested a one-month ceasefire and pledged disarmament. He visited the Defense Ministry on March 10 and declared himself "an impenetrable wall" against LAF fragmentation. In Week 2, he navigated the LAF commander crisis, **refusing US-French pressure to remove Commander Heikal** on the calculation that a wartime change in command would cause institutional paralysis. In Week 3, he was active on the diplomatic track, facilitating the Mansour-Mansour Cyprus backchannel and receiving the Papal Nuncio. His disarmament pledge had become the international community's primary reference point for Lebanese state credibility. In Week 4, he received Macron's personal call on March 25; France confirmed armored vehicles for the LAF. The active Aoun-Berri back-channel on the ambassador crisis ("three exits" formula) ran parallel to Salam's public posture. Geagea's call at the Maarab Conference positioned Aoun as the legitimate interlocutor for any off-ramp, separating the president from Hezbollah's posture while preserving institutional structure.

D. The Dagher Red Line

Kataeb political advisor Dagher stated on March 26: "Nobody will do a May 7 in our areas... this is the land of saints, not a place to receive devils". This is the most explicit Christian political red line against Hezbollah domestic coercion during this conflict. The May 2008 reference is precise and intentional. Its deployment, alongside Bassil's and Geagea's similar formulations, indicates that **multiple Christian political actors assess internal coercion as a plausible Hezbollah post-war strategy.**

E. Christian-Area Social Dynamics

Property owners in Christian areas screened tenants for political affiliations and refused those with suspected Hezbollah connections, fearing their buildings would become targets. This produced soft sectarian segregation at the individual transaction level. Separately, fragments from an intercepted Iranian Shahab-family Qadr missile landed in Kesrouan, the Christian heartland. Social friction was documented but no violence occurred. The incident brought the regional war physically into a non-Shia community, reinforcing the "we are all targets" narrative while inflaming anti-Hezbollah sentiment. The connection to Palm Sunday is worth noting: on March 29, Israeli police blocked the Latin Patriarch from mass at the Holy Sepulchre, an event that carries deep symbolic weight in the Maronite political imagination and has the potential to shift sentiment toward active alignment with the sovereignty coalition's ceasefire push.

ANALYTICAL ASSESSMENT

The Christian convergence is on the sovereignty principle. The divergence is on method. May 2008 is the common reference point. Christian political figures warn not against Hezbollah fighting Israel, but against Hezbollah turning weapons inward after the war. The warnings from Dagher, Bassil, and Geagea are preemptive, not reactive. **The Christian bloc is supporting the state's sovereignty posture while hedging against Hezbollah post-war coercion.**

VI. SUNNI DYNAMICS

The absence of unified Sunni leadership is a political fact, not a gap in the analysis. No organized Sunni political force operated during March 2026. Former Prime Ministers Siniora and Mikati made no major public statement during the four-week period. Saad Hariri signaled Future Movement's return to elections on February 14, 2026, but during the conflict the FM issued only a denial about being absent from "a Beirut disarmament meeting" on March 29, confirming sensitivity about disarmament positioning without committing to a stance. Hariri is waiting for the post-war landscape before committing.

A. The Leadership Vacuum and PM Salam

PM Najib Salam fills the vacuum by default. His framing, "Lebanon must not remain an arena for others' wars" and "this is not our war; Hezbollah dragged us into it," provides the Sunni community its clearest state-level alignment without requiring a factional position. This makes Salam simultaneously indispensable and vulnerable. He is indispensable because no other Sunni figure occupies the institutional space. **He is vulnerable because any collapse of his government removes the community's sole institutional representative, triggering a destabilizing political vacuum that no existing Sunni organization can fill.**

Deep Sunni wariness about Hezbollah's military power is informed by historical memory of May 2008 and the Syria intervention. Predominantly Sunni northern Lebanon is absorbing displaced Shia populations, creating demographic compression without service infrastructure. Low-level anxiety was documented but no organized opposition emerged.

B. The Grand Serail Protest Flashpoint

The Grand Serail protest on March 28 activated a latent dynamic. When Hezbollah supporters gathered outside the Serail, attacking Salam and labeling him "Zionist," a cross-community solidarity campaign, "We stand with you," launched spontaneously on social media. Sunni MP Fouad Makhzoumi publicly addressed the protesters: "You are protesting at the wrong address. Your problem is not with Mr. Salam, who is trying to salvage what's left, but with your leadership, which hijacked your decisions and dragged Lebanon into wars that aren't ours." This is not organized Sunni political mobilization; it is individual Sunni figures publicly staking out positions when provoked.

ANALYTICAL ASSESSMENT

Three conditions would activate the Sunni community politically: a direct security threat to Sunni-majority areas, a collapse of the Salam government, or a Hariri return with a clear political program. None of these conditions was met during March. **Sunni neutrality holds as a structural condition. But the Serail protest demonstrates that Hezbollah pressure on Salam activates Sunni solidarity that organized Sunni politics cannot produce.** The threshold is not a diplomatic event but a direct domestic threat.

VII. DRUZE DYNAMICS, JUMBLATT'S CALCULATION

Walid Jumblatt's week-by-week positioning reveals a consistent Druze political calculus: prioritize institutional anchors over parliamentary mediation, maintain strategic ambiguity on the war itself, and preserve civil peace as the non-negotiable red line.

A. Pre-war (March 1)

Jumblatt warned of "chaos" in Iran and the region and said Lebanon had not yet entered the war. "Arabs do not hold cards of pressure."

B. Week 1 (March 2 to 6)

Jumblatt visited LAF Commander General Aoun on March 6. The PSP gravitated toward the military institution rather than Berri's parliamentary mediation. **The Druze community sees the LAF, not parliament, as the critical institutional anchor.** Druze leader Talal Arslan separately visited the LAF Commander at the Defense Ministry on March 12.

C. Week 2 (March 7 to 13)

Jumblatt signaled openness to negotiations only in coordination with Berri. The Geagea-PSP delegation meeting at Maarab showed active cross-sectarian consultation on the sovereignty question.

D. Week 3 (March 14 to 20)

"Don't attack the army," Jumblatt warned, cautioning against fitna. He defended displaced persons as Lebanese who will return: "Despite being in 2026, there are still those who think in a racist way."

E. Week 4 (March 21 to 29)

On March 23 Jumblatt made his closest approach to direct criticism of Hezbollah's war posture: "Rejecting negotiation for the sake of rejection and using Lebanon as an open arena is rejected." On March 24, the Bchamoun strike killed two in a predominantly Druze town. **Jumblatt's response was 96 hours of silence.** On March 27 a PSP delegation met Geagea at Maarab and issued a joint statement: "Israel is lying in wait to ignite sectarian strife among Lebanese, and we must not play into that objective." PSP's Georges Okais declared "civil peace is a red line," the clearest PSP-LF convergence of the war. On March 28, Taimour Jumblatt framed the danger: "The greatest danger is civil strife," a formulation that is anti-fitna rather than anti-Hezbollah or anti-Israel. On the same day, Jumblatt arranged housing for displaced persons, maintaining humanitarian engagement independent of Hezbollah's political position.

The Bchamoun silence carries three possible readings. First, Jumblatt is calculating which way the war resolves before committing. Second, he is managing his relationship with Berri. Third, he is assessing that Druze safety depends on avoiding any statement that makes the community a target. What the silence does not mean is indifference to the Salam government's survival. An anti-Hezbollah MP stated explicitly that Jumblatt "will not take long to defend the prime minister against Hezbollah" if the confrontation escalates domestically. The silence is tactical, not positional.

The PSP's institutional calculation centers on the LAF as the critical anchor for the Druze community. The convergence with the LF on civil peace is a Druze assessment that the post-war order will be shaped by whoever controls the security framework. **Jumblatt is positioning the Druze to be aligned with whatever institutional structure survives the war.**

ANALYTICAL ASSESSMENT

One piece of unverified reporting requires flagging. Claims that the Chouf is hosting displaced Hezbollah members circulated during the period. No corroborating Arabic-language reporting was identified across searched open sources. If confirmed, this would indicate the PSP and Druze leadership are providing operational sanctuary, fundamentally changing the community's claimed neutrality. The claim requires field verification and cannot support analytical weight.

VIII. HEZBOLLAH, PRESSURING BUT NOT TOPPLING THE SALAM GOVERNMENT

The analytical object has two parts: Hezbollah's systematic pressure campaign against the Salam government's sovereignty moves, and Hezbollah's deliberate decision to stop short of toppling the government during the war. Both dynamics are in play simultaneously.

A. Week 1 (March 2 to 8)

Hezbollah violated the cabinet ban on military activities within hours of its passage. No public statement targeted Salam personally, but the operational violation was the first countermove against the sovereignty framework.

B. Week 2 (March 9 to 15)

The National Officers manifesto appeared on March 12, published through Al-Akhbar, Hezbollah's media window, warning against deploying the army against the party. **Hezbollah's response to Aoun's disarmament pledge on March 13 was muted compared to its response to Salam's framing, signaling a distinction between the two institutional targets.**

C. Week 3 (March 16 to 22)

Secretary-General Qassem framed any negotiation under fire as "capitulation." Hezbollah-aligned media intensified the framing of Salam's sovereignty moves as externally directed (US, Saudi, and Israeli pressure) rather than legitimate Lebanese state action.

D. Week 4 (March 23 to 29)

The pressure campaign peaked. On March 24 Hezbollah condemned the ambassador expulsion as "reckless, condemnable, and legally baseless" and issued a direct threat to FM Bou Habib. On March 25, Sheikh Qablan publicly instructed the ambassador to stay. On March 26, the cabinet boycott (joint Hezbollah-Amal) began, and a Hezbollah parliamentary deputy called for expulsion of the US ambassador in retaliation. On March 27, Wafiq Safa threatened to "force the government to reverse course after the war." On March 28, Hezbollah supporters gathered in front of the Grand Serail, attacking Salam and labeling him "Zionist." Hezbollah MP Ibrahim Moussawi, facing the crowd's anger, tried to calm tensions and urged protesters not to attack Salam personally. Senior party officials publicly distanced Hezbollah from the sit-in: "We have no connection to Saturday's gathering." On March 29, Ambassador Shibani defied the expulsion order and remained.

The deliberate restraint beneath the pressure campaign is explicit. A senior Hezbollah official stated: "Despite our dissatisfaction with a Cabinet that wants to disarm us while Israel bombs the country, we understand that in wartime, anything that could shake the country must be avoided." This is not weakness. **It is a calculated assessment that toppling the Salam government now would trigger a cross-sectarian backlash.** Change MP Mark Daou articulated the trap Hezbollah is in: "They know that in the current context, with public opinion so strongly against them, it will be difficult to form a new government that includes them." An anti-Hezbollah MP added: "Any attempt to bring down the government would trigger a wave of Sunni, Christian, and Druze support for Nawaf Salam."

ANALYTICAL ASSESSMENT

The confrontation is explicitly postponed. **Hezbollah is waiting for the outcome of the war, both regionally and locally, before deciding whether to topple the government or stage a domestic coup de force.** The Salam-Aoun distinction is analytically significant. Hezbollah has not publicly challenged President Aoun's legitimacy. Attacks target the Salam government specifically. Aoun's disarmament pledge on March 13 was received with muted response. Aoun's presidency commands cross-sectarian legitimacy that Salam's government does not. Salam is the more vulnerable target: he is Sunni, his government is perceived as March 14-aligned, and his language has been the sharpest. Al-Akhbar's coverage consistently frames Salam's moves as externally directed while covering the presidency more neutrally. This editorial pattern confirms Hezbollah's domestic strategy: pressure Salam as the instrument of external pressure while preserving the channel to the presidency through FPM, and defer the final reckoning until after the war.

IX. THE ISRAELI POLITICAL-SECTARIAN DIMENSION

Israel's military campaign is producing political-sectarian facts on the ground faster than any diplomatic process can address them. The analytical object here is not Israeli military strategy (established in Report 1) or Israeli diplomatic demands (reserved for Report 4), but how Israeli actions create irreversible domestic Lebanese political-sectarian realities that Lebanese actors must navigate.

A. Week 1 (March 2 to 8)

Lapid's "Yellow Line" concept appeared on March 6: "scrape a few villages." The language of permanent buffer entered Israeli political discourse from the center-left opposition, signaling cross-party consensus. Evacuation orders covered 53 villages, overwhelmingly Shia-majority. The AQAH strikes on March 9 to 10 targeted the Shia community's financial infrastructure specifically.

B. Week 2 (March 9 to 15)

The ground invasion framing shifted from "1701 enforcement" to "permanent buffer zone until Hezbollah is disarmed." Katz explicitly framed the Zarariah Bridge destruction as political coercion against the Lebanese government. The Litani ceiling was discarded. The Zahrani evacuation line doubled the buffer. Lebanese political actors had to begin calculating around permanent Israeli presence, not a temporary military incursion.

C. Week 3 (March 16 to 22)

The ground offensive deepened across all three axes. The last functioning hospital in the south was seized, eliminating healthcare access for the remaining southern population and forcing medical dependency on Beirut, a political fact as much as a humanitarian one. **Katz's March 22 order to accelerate demolition of Lebanese homes in border villages "following the model of Beit Hanoun and Rafah in the Gaza Strip" is explicit stated policy.** The demolition order's Gaza comparison closes the space for Lebanese political actors to frame the destruction as disproportionate response; the Israeli government stated its intentions openly.

D. Week 4 (March 23 to 29)

Netanyahu's March 29 order to "expand the current security buffer area." Katz: "will not return until security is ensured." Twenty planned "strategic observation posts" were confirmed. Lapid's "Yellow Line," Smotrich's "new border," and Netanyahu's "months or possibly years" framing together **shifted the Israeli political vocabulary from "temporary buffer" to normalized occupation.** Every Lebanese political actor's calculation about the post-war order is now shaped by the geography the IDF is creating, not by any diplomatic framework.

The targeting pattern produces a sectarian asymmetry in physical outcomes. Systematic demolition of Shia-majority border villages is documented. Over 50 village evacuation orders overwhelmingly cover Shia areas. AQAH destruction targeted financial infrastructure used by the Shia community specifically. **Christian and Druze communities in the south are receiving differential treatment.** Rmeish, a Christian border village, was not subject to demolition orders. Its residents told the Papal Nuncio "we want peace." The differential treatment is observed and its political implications are already visible. Communities whose villages were spared have a different stake in the post-war order than communities whose villages were demolished. This asymmetry is already expressed in political positioning: Christian sovereignty maximalism, Druze calculated neutrality, Shia existential anxiety.

ANALYTICAL ASSESSMENT

The settlement question requires structured uncertainty. No confirmed reporting of Israeli plans for civilian settlements exists. The confirmed terms are "strategic observation posts" and "forward defense zone." The Golan and West Bank precedent is that Israeli security presence has historically evolved into permanent settlement regardless of stated intent. If the buffer zone persists for months or years, the probability of de facto civilian encroachment increases. This is a scenario, not a fact. Who benefits from the new geography: communities whose villages were spared retain a physical asset; Shia communities whose villages were demolished do not. Post-war reconstruction politics will be shaped by this asymmetry. Shia communities need reconstruction. Christian and Druze communities need stability. These are

different political demands, and different external actors will seek to satisfy them for different purposes. **The demographic reshaping of the south is the most consequential domestic Lebanese outcome of the conflict.**

X. ECONOMIC DIMENSION

Lebanon's war economy compounds a pre-existing financial collapse with acute war disruption. The economic indicators across March 2026 describe a system under compound stress where no single variable is catastrophic in isolation, but the combination produces cascading fragility.

A. Inflation and Cost of Living

Inflation accelerated throughout the period. February 2026 recorded a 12.27% annual rate, up from 10.91% in January, the highest since November 2025. March data indicates significant further acceleration: fuel prices rose by 300,000 LBP for petrol and 600,000 LBP for diesel; rents increased by up to 500% in certain areas; service taxis operated on self-set fares of 300,000 LBP; and black market pricing emerged for diesel in Beirut. The Lebanese pound remains under quiet pressure. No Central Bank statement was issued during the reporting period. Structural vulnerability persists through war-driven inflation, reduced dollar inflows from tourism and diaspora, and potential collapse if the port or airport is hit.

B. Transport and Tourism

The transport lifeline is narrowing. By late March, only MEA and Royal Jordanian flew limited routes. All other international carriers suspended operations. The airport director described maintaining operations as "a fundamental pillar of national resilience." The port remains the primary civilian lifeline, but no granular throughput data was published during March. The Syrian land border closure from March 5 severed approximately 70% of non-perishable goods and pharmaceutical precursors. Tourism has collapsed entirely. Hotel occupancy fell to 7 to 11% versus a projected 80 to 90% for the Eid and Easter period. The war's timing coincided with the peak tourism season, maximizing the economic damage.

C. The AQAH Vacuum

The AQAH vacuum is the critical economic variable. AQAH's destruction leaves no functional replacement for hundreds of thousands of Shia families who depended on the institution for savings, microfinance, and social safety net functions. This is not merely a humanitarian problem; it is a political-economic one. **Whoever fills the vacuum gains the community's economic loyalty.** If Hezbollah fills it through alternative channels, the party strengthens its grip. If the state or international actors fill it, they create a competing loyalty structure. The government's insistence on direct transfer to displaced persons is a small but significant assertion of state control over the assistance flow.

D. Public and Private Sector Strain

Civil servant salary delays were confirmed and resolved under pressure on March 27. The episode signals fragility: state employees running the humanitarian system were not being paid on schedule during a war. The private sector is absorbing compound losses. Gulf exports are virtually frozen. Agricultural damage is severe: 90,000 poultry lost, 36,000 hectares (22% of agricultural land) damaged. Southern Lebanon represents approximately 20% of national agricultural output. Al-Amana fuel stations, part of Hezbollah's economic network, were destroyed. War economy dynamics are visible in fuel hoarding, black market emergence, and displacement-driven demand distortions in rent, transport, and food prices.

ANALYTICAL ASSESSMENT

Lebanon's economic trajectory through March 2026 is not a crisis that began with the war. It is a pre-existing collapse that the war accelerated and concentrated. **The AQAH vacuum is the variable that will determine whether the Shia community's post-war economic relationship is with the state, with Hezbollah, or with no institution at all.**

XI. THE FAILED CEASEFIRE INITIATIVE, INTERNAL LEBANESE DIMENSION

The ceasefire initiative's failure is treated elsewhere in its diplomatic dimension. What matters for this report is why the initiative failed as a product of internal Lebanese political dynamics.

A. Week 1 (March 2 to 8)

Aoun's ceasefire request was declaratory. No formal channel opened. Lebanon framed itself as a war victim seeking international protection, not a party seeking a negotiated end.

B. Week 2 (March 9 to 15)

The Cyprus backchannel activated. The Mansour-Mansour track (Dr. Aiman Mansour, an Israeli Druze NSC veteran, and Brig. Gen. Tony Mansour, a former LAF intelligence director) operated under UN and Cypriot cover. The framework positioned the ceasefire as "a security agreement, not peace," a formulation intended to be palatable to Hezbollah's base. Two structural problems doomed the track. **Berri was entirely absent from the architecture**, and the track therefore lacked the one actor who historically converts Hezbollah positions into negotiable terms. Simultaneously, the National Officers manifesto on March 12 destroyed the track's core premise by publicly announcing that the LAF would not execute disarmament, the very commitment the backchannel was offering.

C. Week 3 (March 16 to 22)

The French framework (Hezbollah disarmament plus direct Lebanon-Israel negotiations) was rejected simultaneously by Hezbollah (which would not accept a disarmament precondition) and Israel (which would not accept the negotiations framing). Aoun's pledge remained the international community's primary reference point for Lebanese state credibility, but no internal mechanism existed to deliver on it.

D. Week 4 (March 23 to 29)

Berri called for return to the November 2024 ceasefire framework; Hezbollah overruled him. **The ambassador expulsion crisis consumed the Lebanese political bandwidth** that would otherwise have been available for ceasefire negotiation. No viable internal track existed by March 29.

ANALYTICAL ASSESSMENT

The internal Lebanese alignment was structurally incapable of producing a ceasefire. **The state was negotiating a war it did not control, with an enforcement instrument (the LAF) that publicly refused to execute the agreement's core requirement (disarmament)**, while excluding the one political actor (Berri) who converts Hezbollah positions into negotiable terms. The ambassador crisis then consumed the political oxygen. Any ceasefire framework that requires Lebanese domestic consensus on Hezbollah disarmament as a precondition is structurally impossible under current political conditions. The state can pledge disarmament internationally; it cannot deliver it domestically.

XII. SCENARIOS

The following scenarios are not mutually exclusive alternatives. They are potentially overlapping layers that can operate simultaneously, with different probabilities and different trigger conditions.

A. Scenario A: Declaratory Sovereignty Freeze (50 to 55% probability)

The government's sovereignty offensive stabilizes at the current level: constitutionally creative, internationally credible, operationally empty. Berri finds a face-saving formula, most likely an Egyptian-facilitated "suspension" of the ambassador expulsion in which the issue is simply removed from the cabinet agenda. The cabinet boycott ends. Shia ministers return to institutional participation. The state enters post-war negotiations with enhanced legitimacy through its record of sovereignty declarations and its UNSC filing, but with no domestic power to enforce what it declared.

The trigger condition is a ceasefire framework that freezes IDF positions, resolution of the ambassador crisis through quiet ambiguity, and Berri's return to institutional participation. The trajectory is a Lebanon that enters post-war negotiations with diplomatic capital derived from four weeks of sovereignty rhetoric, while the enforcement gap persists and is managed through international mechanisms rather than domestic capacity. The AQAH vacuum is partially filled by international aid channeled through the state, giving the government limited leverage over the Shia community's economic recovery.

This is the baseline scenario because it requires the least structural change. It is also the scenario with the least transformative potential: the pre-war power geometry persists beneath a new rhetorical surface.

B. Scenario B: Domestic Coercion (10 to 15% probability, post-war only)

Hezbollah uses its domestic security apparatus to reverse the state's sovereignty course. Political intimidation of sovereignty-aligned ministers, targeted security operations, and localized kinetic clashes in mixed areas force the LAF to choose sides. The confrontation Hezbollah explicitly deferred to the post-war period (Section 8) is activated.

The trigger condition is a war that ends without a comprehensive disarmament framework, combined with a Hezbollah assessment that Salam used the war to permanently shift Lebanon's alignment toward the Western-Arab axis. A specific provocation, real or manufactured, triggers the coercion.

The trajectory is Hezbollah deploying security cadres to intimidate politicians and media. Localized clashes erupt in Beirut's mixed areas. Christian actors invoke the "May 7" red line. Physical confrontation in Christian areas is the most dangerous escalation point. The state's sovereignty record is erased by force. The probability is revised downward from earlier estimates because Hezbollah's own wartime statements explicitly deferred this option, and because the cross-sectarian backlash cost (assessed in Section 8) constrains even post-war activation. If Hezbollah's military degradation is severe enough to reduce its coercive capacity, this scenario becomes less viable regardless of intent.

C. Scenario C: Intra-Shia Resource and Narrative Friction (20 to 25% probability)

The sheer scale of the post-war reconstruction demand collides with Hezbollah's financial degradation, triggering quiet but intense socio-economic competition between Amal and Hezbollah over who controls the recovery of the devastated Shia constituency. The "break" is not a top-down political divorce by Berri. It is grassroots friction over survival.

The trigger condition is a war that ends with AQAH destroyed and Iranian reconstruction funding severely curtailed or sanctioned. International aid flows exclusively through state channels that Amal influences heavily. The displaced southern population demands immediate rebuilding of demolished villages.

The trajectory is Hezbollah attempting to maintain its patronage model while lacking the capital. Amal leverages state ministries and international aid to deliver tangible recovery, creating a competing loyalty structure. Friction erupts at the municipal level in the south and in Dahiye over aid distribution, housing, and the resistance narrative's cost to the community. Berri does not formally decouple from Hezbollah; instead, he uses the state's reconstruction monopoly to quietly bound Hezbollah's autonomy and reassert Amal's primacy in the Shia street. This scenario can operate beneath Scenario A (the state's sovereignty rhetoric provides the institutional framework through which Amal channels reconstruction resources) and can coexist with a reduced version of Scenario B (Hezbollah's coercive pressure on the government is constrained by its dependence on the state apparatus that Amal partly controls for reconstruction funds).

STRATEGIC ANALYSIS

LEBANON UNDER SIEGE

The Diplomatic Dimension

March 2026

KEY JUDGMENTS

1. **No Lebanon-specific diplomatic track produced an enforceable outcome in March 2-29.** Five separate initiatives (Aoun ceasefire request, Cyprus backchannel, French framework, Barrack back-channel, Guterres 1701 revival) failed for the same two structural reasons: the actors with leverage do not want a Lebanon-specific ceasefire on terms Lebanon can deliver, and the actor whose consent is required (Hezbollah) subordinated its decision-making to Tehran on March 12.
2. **Iran's demand for simultaneous cessation on all fronts including Lebanon has been rejected by Washington.** Transmitted through Pakistan on March 26, this counter-condition was the decisive diplomatic variable for Lebanon's fate. Netanyahu informed senior US officials in closed-door talks that any US-Iran agreement will not apply to Lebanon, and a senior Israeli official confirmed: "Lebanon does not matter to President Trump." The US accepted Israel's position. The IDF completes the buffer zone under diplomatic cover.
3. **The Islamabad Quadrilateral (March 29) confirmed Lebanon's exclusion from the regional deal architecture.** Pakistan, Saudi Arabia, Turkey, and Egypt focused on Hormuz shipping proposals to Washington. Lebanon was not represented. The meeting's Lebanon-blindness is itself an analytical finding: the regional powers coordinating around Iran did not include Lebanon's diplomatic interests in their framework, confirming its status as a theater rather than a stakeholder.
4. **Hezbollah's strategic subordination to Tehran renders local diplomatic initiatives structurally incoherent.** The organization's public baya'a to Mojtaba Khamenei (March 12) did not create this dynamic, but it publicly reaffirmed that Hezbollah's decisions on war and peace remain lashed to the Iranian leadership's calculus, not to Lebanese state imperatives. Lebanese diplomats cannot deliver an agreement on Hezbollah's behalf.
5. **Two unnamed European states' direct intermediary contact with Hezbollah is the most structurally significant diplomatic signal of the month.** It confirms that some European actors have concluded the Lebanese government track is insufficient and that any durable outcome requires direct Hezbollah engagement, a fundamental departure from the official Western posture.
6. **Netanyahu's March 29 buffer zone expansion order, issued on the same day as the Islamabad Quadrilateral and without apparent US objection, confirms the US has not imposed a geographic restraint on Israel's Lebanon operations.** The simultaneity of territorial expansion and regional diplomatic activity reveals that the diplomatic track and the military track are operating independently.
7. **Saudi Arabia's leverage activates after the war, not during it.** Riyadh's strategic interest is Iran-specific, not Lebanon-specific. Its post-war reconstruction role is its primary diplomatic tool, and the waiting posture (watching Hezbollah degrade before leading reconstruction) is deliberate.
8. **The most probable outcome (60-70%) is a frozen buffer zone occupation without agreement,** requiring no diplomatic breakthrough and representing the default trajectory if the current operational and diplomatic conditions continue.

CENTRAL QUESTION

What actual diplomatic activity occurred around Lebanon in March 2-29, what leverage exists, and what are the realistic off-ramp scenarios?

A. Critical Framing: Lebanon as a Variable, Not a Party

Lebanon is not a diplomatic actor in this conflict. It is a theater whose significance operates on two levels: first, the physical fact of **Hezbollah's military degradation as a conditioning factor for the broader US-Iran confrontation**; second, the symbolic value of that degradation for Gulf states' post-war strategic architecture and for Israel's regional deterrence posture. All diplomatic activity involving Lebanon is analyzed through this lens. **Lebanon appears in negotiations as a variable, not as a party.**

I. LEBANON AS THEATER, STRATEGIC SIGNIFICANCE OF THE LEBANESE FRONT

A. Lebanon's Exclusion from Every Active Negotiation

Lebanon is not a party to any negotiation taking shape as of March 29. This is not an oversight. It is the structural consequence of a conflict in which the actors who possess leverage treat Lebanon as a geographic theater, and the actor whose military consent is required for any ceasefire (Hezbollah) has lashed its strategic decisions to Tehran's calculus rather than to Lebanese state imperatives.

The Islamabad Quadrilateral on March 29 is the clearest confirmation of this exclusion. Pakistan, Saudi Arabia, Turkey, and Egypt convened at the foreign minister level to present Hormuz shipping proposals to Washington. Lebanon was not represented. There is no evidence Lebanon was invited to participate. Lebanon does not appear in any confirmed deliverable from the meeting. The four powers assembled to coordinate their interests around the US-Iran confrontation. They treated the Strait of Hormuz, not the Litani River, as the geographic variable requiring collective diplomacy. **The meeting's Lebanon-blindness is itself the analytical finding:** the regional states most engaged with the war's parameters did not consider Lebanon's diplomatic interests worth including in their framework.

The US-Iran channel operates through Pakistani intermediaries. The 15-point US plan transmitted to Tehran does not name Lebanon as a party. **Lebanon appears only as a downstream variable embedded in the "limits on arms transfers to militias" clause.** Iran's counter-conditions, transmitted March 26, include a demand for simultaneous cessation on all fronts including Lebanon, but this demand was rejected by Washington at Israel's insistence. Lebanon entered the US-Iran negotiation as a condition proposed by one side and refused by the other. At no point did any party consult Beirut on this exchange.

The Cyprus backchannel, the most structurally developed Lebanon-adjacent initiative during the period, operated under UN and Cypriot cover through two intelligence figures: Dr. Aiman Mansour, an Israeli Druze with National Security Council experience, and Brig. Gen. Tony Mansour, a retired LAF intelligence director. The Lebanese official delegation participating in this channel controls none of the military activity it seeks to negotiate an end to. **Speaker Berri, the one Lebanese actor who has historically converted Hezbollah positions into negotiable terms, was entirely absent from the architecture.** The channel is a parameter-mapping exercise, not a negotiation between parties with the power to deliver outcomes.

B. The Twofold Strategic Significance of the Lebanese Front

The Lebanese front matters to external actors for two reasons, neither of which centers on Lebanon itself.

The first is its function as a conditioning factor for the US-Iran confrontation. Hezbollah's rocket arsenal stood at approximately 25,000 to 30,000 at the war's start. By March 29, estimates place it at 11,000 to 13,000. The IRGC Quds Force Lebanon Corps was effectively eliminated in the first week. The Iran-Syria-Lebanon supply corridor is functionally defunct, with Syrian authorities seizing three Hezbollah smuggling tunnels near Hawsh al-Sayyid Ali in Homs Province on March 28 and 29. **This degradation removes Iran's primary conventional deterrent against Israeli action on the nuclear program.** Tehran's negotiating position weakens with each day the Lebanon campaign continues. Iran's insistence on simultaneous cessation on the Lebanon front, delivered through its March 26 counter-conditions, confirms that Tehran reads the campaign as destroying its deterrent posture in real time. The demand is not about Lebanon. It is about the strategic asset being consumed on Lebanese soil.

The second is the symbolic and strategic value for Gulf states. Hezbollah's containment in Lebanon is the most visible proxy indicator of whether Iran's regional project has been checked. **Saudi Arabia, the most consequential Gulf actor in this context, is maintaining a deliberate waiting posture.** Riyadh calculates that Hezbollah's military degradation serves Saudi strategic interests by reducing Iran's capacity to project force across the region. The Kingdom's post-war reconstruction role is its primary diplomatic tool. By waiting for the military campaign to degrade Hezbollah before leading reconstruction and political restructuring, Saudi Arabia positions itself to shape the post-war order without bearing the costs of the war. The Gulf states' private lobbying for continued escalation, documented during the period, confirms that they read the war as serving their strategic interests against Iran and oppose any premature cessation.

C. Hezbollah's Strategic Subordination to Tehran

On March 12, Hezbollah's Secretary-General announced the organization's oath of allegiance (baya'a) to Mojtaba Khamenei, the new Iranian Supreme Leader. This act did not represent a new transfer of authority. Hezbollah's strategic decisions on war and peace have always been structurally subordinated to Wilayat al-Faqih. **The baya'a publicly reaffirmed the continuity of this relationship during an Iranian succession crisis.** It locked the organization into the Iranian strategic framework at the precise moment when Lebanese state actors and Speaker Berri were seeking space for a Lebanese-first calculation.

The consequence for diplomacy is structural incoherence. Lebanese diplomats cannot deliver an agreement on Hezbollah's behalf. **The organization's strategic calculus remains lashed to Tehran's requirements:** Iran demands simultaneous cessation on all fronts, Hezbollah cannot accept a separate Lebanese settlement without Iranian authorization, and Iran's authorization is contingent on the broader US-Iran negotiation. The Cyprus civilian track, Aoun's disarmament pledge, Salam's UNSC filing, and every other Lebanon-specific initiative share the same fatal flaw. They propose outcomes that require Hezbollah's consent, but Hezbollah's consent is not available at the Lebanese level. Only the US-Iran track, operating through Pakistan, holds the leverage to produce a ceasefire that includes the Lebanese front by binding Iran and, through Iran, Hezbollah. And that track has been resolved against Lebanon.

D. The State as Sovereignty Performer

Lebanon's diplomatic activity during March 2 to 29 built an international legitimacy record and created a legal foundation for post-war accountability. President Aoun requested a one-month ceasefire and pledged to disarm Hezbollah and confiscate all weapons. PM Salam sent letters to President Trump and the United Nations. Lebanon filed a formal complaint at the UN Security Council on March 26, its first institutional filing since the war began. Ambassador Ahmad Arafa received a verbal note from the Foreign Ministry instructing him to formally notify the United Nations of the March 2 cabinet ban and Aoun's negotiations initiative. This converts the domestic political act into a formal international legal record. Lebanon expelled the Iranian ambassador on March 24.

ANALYTICAL ASSESSMENT

None of this activity can produce an enforceable outcome without external guarantors. The state cannot compel Israel to halt operations, cannot compel Hezbollah to cease fire, cannot compel the United States to impose a geographic restraint on its ally, and cannot com-

pel Iran to decouple the Lebanon front from the broader confrontation. **The state is performing sovereignty for the record, not negotiating from leverage.** This is a deliberate strategy with a specific logic: by accumulating sovereignty declarations, international filings, and legal records, Lebanon positions itself as a credible state actor for the post-war phase when conditions for a real agreement emerge. The value of the performance is prospective, not immediate.

II. WHY EVERY LEBANON-SPECIFIC INITIATIVE FAILED

Five separate diplomatic initiatives addressed the Lebanese front between March 2 and March 29. All five failed. The failures were not expressions of diplomatic inadequacy or insufficient creativity. They were expressions of a structural impossibility produced by two conditions that no initiative could overcome.

The first condition: the actors with leverage (the United States and Israel) do not want a Lebanon-specific ceasefire on terms Lebanon can deliver. Israel's war aims, documented in Report 1, require the completion of a continuous buffer zone from Naqoura to Shebaa Farms, the systematic demolition of border villages, and the degradation of Hezbollah's military infrastructure to a level that eliminates its deterrent function. A ceasefire at any point before these objectives are achieved contradicts Israel's operational logic. **The United States, by accepting Netanyahu's explicit communication that any US-Iran deal will not apply to Lebanon, has ratified this position.**

The second condition: the actor whose consent is required for any ceasefire (Hezbollah) remains strategically subordinated to Tehran's requirements. This precludes it from negotiating a separate Lebanese settlement. Hezbollah's March 12 baya'a publicly reaffirmed this subordination. Secretary-General Qassem framed any negotiation under fire as "capitulation." **The organization's decision-making authority on the question of war and peace resides in Tehran, not in Beirut.**

Together, these two conditions render all Lebanon-specific diplomacy structurally incoherent. The following week-by-week record documents how each initiative encountered one or both conditions and collapsed.

A. Week 1 (March 2-8)

Aoun's Ceasefire Request

President Aoun requested a one-month ceasefire and pledged to disarm Hezbollah and "confiscate all weapons." This was the most explicit disarmament commitment by any Lebanese head of state since Hezbollah's founding. It became the international community's primary reference point for Lebanese state credibility.

The pledge was declaratory. No formal diplomatic channel opened to receive it. The state framed Lebanon as a war victim seeking international protection, not a negotiating party making a conditional offer. The LAF, the institution that would need to execute any disarmament, cannot do so. Approximately 30% of its personnel are Shia, and the National Officers manifesto, which surfaced on March 12 but expressed sentiment already present within the institution, warned that any deployment against Hezbollah risks fracturing the military along sectarian lines. **The state's own enforcement instrument was structurally unable to deliver the pledge's core commitment.**

Israel's war aims had already exceeded what a ceasefire request could deliver. By the end of Week 1, over 70 weapons depots had been struck, the IRGC Quds Force Lebanon Corps leadership had been decapitated, and three divisions were deploying along distinct axes. The ground campaign was underway. A ceasefire request from a state that controlled none of the military activity on its territory carried no weight against an adversary that was achieving its objectives on schedule.

B. Week 2 (March 9-15)

Three Simultaneous Failures

Three distinct diplomatic tracks collapsed in the same week, each encountering a different face of the same structural impossibility.

The Cyprus backchannel entered its parameter-mapping phase under UN and Cypriot cover. The Mansour-Mansour track was structurally incoherent by design: **Lebanon's official delegation controlled none of the military activity.** Berri was entirely absent from the architecture. This removes the one actor who has historically converted Hezbollah positions into terms other parties can engage. The National Officers manifesto on March 12 destroyed the track's core premise by publicly confirming that the LAF would not serve as an enforcement instrument for disarmament. A ceasefire framework that promises disarmament through an army that refuses to disarm is a contradiction that no amount of diplomatic creativity can resolve.

The French framework proposed Hezbollah disarmament paired with direct Lebanon-Israel negotiations. **Hezbollah rejected the disarmament precondition. Israel rejected the negotiations framing.** The simultaneous rejection from both sides confirmed that no formulation existed that could satisfy the minimum conditions of both parties within a Lebanon-specific track. This rejection triggered Lebanon's pivot to the Cyprus initiative, which was itself already compromised.

The Barrack back-channel represented Lebanon's attempt to open a direct peace channel with Israel through US envoy Tom Barrack. Israel called it "nonsense." The rejection carried an additional signal: **Israel's demands had moved beyond Hezbollah disarmament to broader Lebanese political restructuring,** a demand set the current government cannot deliver. The Barrack channel was dead on arrival because the Israeli demand exceeded the Lebanese offer before the first substantive exchange occurred.

C. Week 3 (March 16-22)

Guterres and the 1701 Revival

UN Secretary-General Guterres arrived in Beirut on March 13 proposing a revival of UNSCR 1701 as the framework for a ceasefire and post-war security architecture. Israel rejected the proposal immediately. Israeli officials insisted on "negotiation under fire" and dismissed 1701 as insufficient for their maximalist objectives, framing the goal as the elimination of Hezbollah's military capacity altogether, not its containment within the 1701 framework. Israel had already publicly discarded 1701 as an operative framework by Phase 3 of the military campaign, when the Zahrani evacuation line doubled the buffer depth beyond anything 1701 contemplated.

The most structurally important development of the week occurred outside the formal diplomatic channels. **Two unnamed European states reached out through intermediaries to Hezbollah,** seeking direct contact. This signal confirmed that some European actors have concluded the Lebanese government track is insufficient and that any durable outcome requires engaging Hezbollah directly. This represents a fundamental departure from the official Western posture, which maintains no contact with Hezbollah's military wing. If the outreach is French-coordinated, it may represent the seed of a post-1701 framework in which Hezbollah is treated as a necessary party rather than an obstacle to be circumvented. If independent, it signals diplomatic fragmentation within the European approach. In either case, it is the forward indicator of what the next diplomatic phase will look like: direct engagement with the organization the current framework was designed to contain.

D. Week 4 (March 23-29)

Legal Record, Not Ceasefire

Lebanon filed a formal UNSC complaint on March 26, its first institutional filing since the war began. The filing placed Lebanese civilian casualties under UN scrutiny, created a legal record for post-war accountability, and converted the domestic sovereignty declarations of the preceding weeks into an international legal instrument. Ambassador Arafat's verbal note to the United Nations formalized the March 2 cabinet ban and Aoun's negotiations initiative.

The filing is not a ceasefire mechanism. It does not compel any party to act. Any enforcement resolution at the Security Council would face a US veto. The filing's value is entirely prospective: it establishes the legal foundation for accountability proceedings, withdrawal demands, and reconstruction claims in the post-war phase. Lebanon's diplomats know this. **The shift from ceasefire-seeking to record-building in Week 4 indicates that the Lebanese government has internally assessed the current phase as diplomatically unresolvable** and is investing in positioning for the next phase.

No viable Lebanon-specific track existed by March 29. The European backchannel to Hezbollah is the forward signal: the next diplomatic phase will bypass the Lebanese government entirely.

ANALYTICAL ASSESSMENT

The five failed initiatives were not failures of creativity or effort. They were expressions of a structural impossibility: Lebanon cannot negotiate a ceasefire for a war it does not control, with an enforcement instrument that publicly refuses to execute any agreement, and without the participation of the one actor whose consent is required.

III. THE REGIONAL DEAL ARCHITECTURE AND LEBANON'S EMBEDDED POSITION

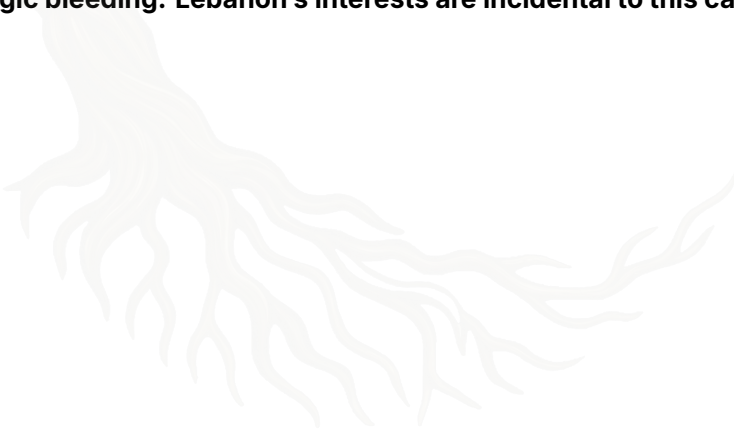
A. The 15-Point US Plan

The United States transmitted a 15-point plan to Iran through Pakistani intermediaries during the March period. The plan proposed a one-month ceasefire, sanctions relief, civilian nuclear cooperation, missile program restrictions, limits on arms transfers to militias, and Hormuz shipping guarantees. Lebanon does not appear in this plan as a party. **It appears only as a downstream variable embedded in the "limits on arms transfers to militias" clause.** This inclusion treats the organization as an Iranian asset to be constrained, not as a Lebanese actor to be negotiated with. The plan's architecture confirms the framing established in Section 1. Lebanon is a variable in the US-Iran equation, not a participant in the negotiation that will determine its fate.

B. Iran's Counter-Conditions (March 26)

Iran formally rejected the US framework as serving "only US and Israeli interests." Tehran transmitted counter-conditions through Pakistan: a permanent guarantee against assassination of Iranian leadership; full war reparations; written guarantees against recurrence; **simultaneous cessation of hostilities on all fronts including Lebanon**; and US-Israeli recognition of Iran's legal rights over the Strait of Hormuz. Iran stated willingness to negotiate item by item rather than as a package.

The Lebanon demand is the single most consequential diplomatic development of the month for Lebanon's trajectory. By insisting on simultaneous cessation on the Lebanese front, Tehran treated the Lebanon campaign as inseparable from the broader US-Iran negotiation. This is not an expression of solidarity with Lebanon or concern for its population. It is Iran's assessment that the Lebanon front is where its deterrent posture is being destroyed in real time. Each day the campaign continues, Hezbollah's arsenal degrades further, the IRGC's forward projection capacity diminishes, and Tehran's negotiating position weakens. **The simultaneous cessation demand is Iran's attempt to halt this strategic bleeding. Lebanon's interests are incidental to this calculus.**



C. The Lebanon Linkage: Resolved Against Lebanon

The linkage question is the analytical spine of this section. Iran demanded that any deal include simultaneous cessation on the Lebanese front. The United States and Israel rejected this demand. The rejection is the resolved status of the question as of March 29.

Netanyahu conveyed in closed-door talks with senior US officials that any future US-Iran agreement will not apply to Lebanon. A senior Israeli official stated explicitly: "Lebanon does not matter to President Trump." **The US accepted Israel's position.** This acceptance is the decisive diplomatic act of the month for Lebanon. It means that the US-Iran track, the only negotiation with the leverage to produce a ceasefire that includes the Lebanese front, has been decoupled from Lebanon at Israel's insistence with Washington's consent.

Netanyahu also rejected a French proposal to halt the war in exchange for President Macron's commitment to help resolve the situation diplomatically. This rejection confirmed that Israel's Lebanon campaign is insulated from both the US-Iran track and European mediation. Israel treats the Lebanon theater as a separate operational domain where its military objectives take precedence over any diplomatic framework.

The consequence is stark: **Lebanon is separated from the Iran track and will be resolved by military facts on the ground.** Iran's demand for simultaneous cessation is structurally dead unless Washington reverses course, a reversal that would require a dramatic shift in US domestic or strategic calculations. The diplomatic cover for Israel's continued operations is complete. The IDF completes the buffer zone not in defiance of diplomacy but in the absence of any diplomatic constraint.

Netanyahu's March 29 order to expand the buffer zone, issued without US objection on the same day as the Islamabad Quadrilateral, is the operational confirmation of this diplomatic resolution. The simultaneity is not coincidental. It demonstrates that the diplomatic track and the military track are operating independently, and that the diplomatic activity of regional powers assembling in Islamabad imposed no restraint on the territorial expansion occurring simultaneously in southern Lebanon.

D. The Islamabad Quadrilateral (March 29)

Pakistan, Saudi Arabia, Turkey, and Egypt convened at the foreign minister level in Islamabad on March 29. The four powers presented "proposals on Hormuz," an actionable deliverable focused on maritime traffic and energy security, to Washington. This was a coordination meeting among regional states seeking to manage the consequences of the US-Iran confrontation, specifically the Hormuz shipping disruption that threatened global energy markets.

Lebanon was not represented. **The meeting's Lebanon-blindness is itself the analytical finding.** Four regional powers actively engaged with the war's parameters assembled to coordinate their response. They did not include Lebanon's diplomatic interests in their framework. Lebanon appeared in no confirmed Islamabad deliverable, and there is no evidence Lebanon was invited to participate. The regional powers coordinating around Iran treated the Strait of Hormuz, not Lebanon, as the geographic variable requiring collective diplomacy. Lebanon's status as a theater rather than a stakeholder is confirmed by its absence from the room where stakeholders convened.

E. Trump's Hormuz Concession and Gulf Calculations

Reports during the period indicated that Trump informed aides he is willing to end the war even if Hormuz remains closed. If confirmed, this concession removes the Gulf states' primary rationale for tolerating the conflict. The Gulf calculation has been structured as follows: tolerate the war because it degrades Iran's regional posture, and the US will eventually secure Hormuz for commercial shipping. **A US concession on Hormuz inverts this logic entirely.** If the US accepts a closed or constrained Hormuz, the Gulf states absorb the economic cost of a conflict that degrades Iran's proxies without receiving the corresponding benefit of restored maritime security.

Gulf states are privately lobbying for continued escalation precisely because they read Trump's energy pause signals as a potential betrayal of this implicit bargain. Trump extended the energy pause to April 6 on March 27, framing it as a concession to Iranian requests while Tehran denied requesting it. The extension maintains ambiguity about the US commitment to Hormuz resolution, keeping the Gulf states in a state of strategic anxiety.

The Gulf calculation matters for Lebanon because Gulf support for the war's continuation depends on the Hormuz calculus. If Trump concedes on Hormuz, the Gulf rationale for tolerating Lebanese destruction collapses. This does not produce a ceasefire, but it shifts the political cost calculus for regional actors who are currently content to watch the Lebanon campaign proceed.

ANALYTICAL ASSESSMENT

The connection between Hezbollah's military degradation and the regional deal architecture is direct. A weakened Hezbollah removes Iran's primary conventional deterrent against Israeli action on the nuclear program. This is why Israel treats the Lebanon campaign as non-negotiable independently of any US-Iran deal. It is also why Iran insists on the simultaneous cessation demand: the Lebanon front is where Iran's deterrent posture is being destroyed in real time. The degradation documented in Report 1, from approximately 25,000 to 30,000 rockets to 11,000 to 13,000, with the IRGC coordination layer eliminated and the supply corridor defunct, changes Tehran's negotiating calculus daily. Each week of continued operations reduces the value of the asset Iran seeks to protect through the simultaneous cessation demand. This creates a paradox: **the longer Iran delays agreement, the less deterrent value the demand protects**. Iran's item-by-item negotiation posture keeps a channel open, but the strategic logic of the channel erodes with each rocket expended.

IV. ACTOR LEVERAGE MAPPING

A. France

France is the only external actor maintaining active diplomatic access to all parties during the period. It proposed a competing UN resolution text. President Macron confirmed the commitment of armored vehicles to the LAF in a call with President Aoun on March 25. France convened 35 nations for Hormuz security coordination through a military-level video conference. It tabled a competing text to Bahrain's draft UN resolution on Hormuz shipping protection.

The constraint is fundamental: **France possesses diplomatic access without military leverage**. It cannot enforce any agreement. It cannot compel Israel to halt operations, Hezbollah to stop firing, or the United States to pressure Israel. The armored vehicles commitment is a post-war positioning bid, not a wartime instrument. France is investing in becoming the primary LAF external military partner in any post-war stability architecture. The value of this investment accrues after the war, not during it.

France's Lebanon efforts encountered what reporting described as "Israeli intransigence." Netanyahu rejected Macron's offer to halt the war in exchange for French diplomatic commitment. The rejection confirmed that **French diplomatic capital, substantial in the Lebanese context, is insufficient to alter Israeli operational calculations**. France's value is as a channel and a post-war architect, not as a decider during the active conflict.

B. Saudi Arabia

Saudi Arabia participated in the Islamabad Quadrilateral, maintaining active diplomatic engagement with the war's parameters. President Aoun and PM Salam requested a Saudi review of the commercial ban on Lebanon. A Saudi delegation visit was planned during the period.

Saudi Arabia's strategic interest is Iran-specific, not Lebanon-specific. Riyadh calculates that Hezbollah's degradation serves Saudi strategic interests by checking Iran's regional project. The Kingdom is maintaining a deliberate waiting posture: watching Hezbollah degrade before leading reconstruction and political restructuring. This is not passivity. It is a calculated sequence. Saudi Arabia's leverage is post-war reconstruction financing. It is the primary potential funder of any post-conflict stabilization. By withholding engagement during the active conflict and positioning for the reconstruction phase, Riyadh ensures that its influence over Lebanon's post-war political order is maximized. Saudi Arabia will enter the post-war phase as the indispensable reconstruction partner, a position that confers leverage over Lebanon's political trajectory that no wartime intervention could match.

C. Qatar

Qatar possesses back-channel access to both Iran and the United States, historically serving as the regional interlocutor when direct communication fails. Qatar's Foreign Ministry confirmed coordination with international partners to support de-escalation in Lebanon during the period.

The constraint is operational: **Qatar cannot deliver Hezbollah's agreement independently of Tehran.** No confirmed Lebanon-specific Qatar mediation output materialized between March 2 and 29. Qatar's role in the current architecture is as a communication facilitator, not a mediator with independent leverage. Its value is contingent on the US-Iran channel remaining open, and even within that channel, Lebanon has been decoupled at Israel's insistence.

D. Egypt

Foreign Minister Abdelatty visited Beirut on March 26, the most senior Egyptian visit since the war began. He called for LAF strengthening and engagement in negotiations. Egypt participated in the Islamabad Quadrilateral. Nabil Fahmy was unanimously nominated as the new Arab League Secretary-General on March 29, inheriting the Lebanon file at a critical juncture.

Egypt's leverage is limited to post-war facilitation. Abdelatty's visit indicated Cairo's calculation that Lebanon's political pathway, specifically the post-ceasefire stability architecture, is where Egyptian influence can make a practical difference. Whether this represents a concrete offer to fund or equip the LAF remains unconfirmed. Egypt's stated position aligns with a broader Arab assessment articulated during the period: "only Trump can stop the war." Cairo acknowledges its own irrelevance to the current phase. The Fahmy nomination positions Egypt to coordinate the institutional Arab response to Lebanon's post-war needs through the League, but this is a prospective positioning, not an active lever.

E. UN/UNIFIL

Lebanon's UNSC complaint on March 26 created a legal record for post-war accountability. France may table a Lebanon-specific resolution. Two UNIFIL peacekeepers (Indonesian) were killed on March 30 in an explosion near Bani, and a third peacekeeper died from injuries. The UNSC convened an emergency session on March 31 following the deaths.

UNIFIL is operationally irrelevant to the ground campaign. Its 10,000 troops remain in an observing posture as IDF positions overlap with its area of operations. Any enforcement resolution at the Security Council would face a US veto. UNIFIL families evacuated from Naqoura in a move characterized as civilian protection, not retreat.

The peacekeeper deaths and the emergency UNSC session create international political pressure but no enforcement mechanism. The deaths do, however, introduce a new variable: **if UNIFIL casualties continue, Article 5 discussions among troop-contributing NATO nations (France, Italy, Spain) become plausible.** A UNIFIL withdrawal triggered by peacekeeper casualties would remove the last international observer layer from southern Lebanon. This eliminates a constraint on expanded Israeli operations. The peacekeepers' presence is less a military factor than a political tripwire. Their removal changes the cost calculus for Israeli expansion, not through military effect but through the loss of international witness.

F. Syria

The Ahmad al-Sharaa transitional government is pursuing "calculating neutrality." Syrian forces are reinforcing borders and distancing from Hezbollah. Damascus refused US encouragement to intervene militarily against Hezbollah. Syrian forces accused Hezbollah of shelling their positions near Serghaya. Four Israeli armored vehicles entered Quneitra countryside on March 27, violating the 1974 disengagement agreement. The Syrian transitional government did not comment.

The eastern logistics corridor through Syria remains Hezbollah's primary supply route. **Syrian authorities seized and closed three Hezbollah smuggling tunnels near Hawsh al-Sayyid Ali in Homs Province** on March 28 and 29, confirming active border management that constrains Hezbollah resupply. Damascus is managing the corridor for post-war leverage, not for wartime assistance to Hezbollah. Al-Sharaa's calculation is to insulate Syria from military spillover while preserving restored diplomatic ties. The border corridor is closing gradually. This adds pressure to Hezbollah's ammunition sustainability without requiring a formal Syrian confrontation with the organization.

G. Two Unnamed European States

Two unnamed European states sought direct intermediary contact with Hezbollah during March. This outreach was tracked as active through the month.

This is the most structurally important signal in the actor mapping. **It confirms that some European actors have concluded the Lebanese government track is insufficient and that any durable outcome requires engaging Hezbollah directly as a party.** This represents a fundamental departure from the official Western posture, which maintains a strict separation between Hezbollah's political and military wings and refuses contact with the latter.

ANALYTICAL ASSESSMENT

The identity of the two states carries analytical weight that cannot be resolved from available information. If the outreach is French-coordinated, it may represent the seed of a post-1701 framework in which the international community treats Hezbollah as a necessary party to any security arrangement, a position France has approached historically but never formalized. If the outreach is independent of French coordination, it signals diplomatic fragmentation within the European approach to Lebanon, with individual states pursuing bilateral channels that diverge from the collective European position. In either case, the outreach confirms that the next phase of Lebanon diplomacy, whenever the current military phase concludes, will operate on different assumptions than the failed initiatives of March 2026. The Lebanese government will not be the sole interlocutor. **Hezbollah's direct participation will be treated as structurally necessary, not as a concession.** This is the forward signal.

V. SCENARIOS

The following scenarios are not mutually exclusive alternatives. They represent potentially overlapping trajectories that can operate simultaneously, with different probabilities, different trigger conditions, and different timelines. All scenarios remain within the diplomatic domain, with military and humanitarian dynamics drawn from Reports 1 and 2 only insofar as they condition diplomatic outcomes.

A. Scenario A: Washington Reverses Course, Lebanon Included in a Regional Deal (10-15%)

This scenario requires Washington to reverse its acceptance of Israel's position and accept Iran's demand for simultaneous cessation on all fronts. Such a reversal would require a dramatic shift in the factors conditioning US calculations. Plausible triggers include a manpower or political crisis inside Israel that makes the Lebanon campaign unsustainable (IDF Chief of Staff Zamir's warning of a 20,000-soldier deficit provides the institutional basis for this trigger); a catastrophic escalation on the Lebanese front (a mass-casualty strike on IDF forces, a successful SAM shoot-down of an Israeli combat aircraft, or Hezbollah's assessed pursuit of IDF soldier abduction); or a Trump calculation that the oil price and Hormuz costs of continued conflict outweigh Israel's Lebanon objectives.

If triggered, the trajectory proceeds as follows: the IDF freezes positions at or near the current buffer zone, approximately 14 km deep as of March 29. A monitored disarmament timeline is established, with Hezbollah's strategic weapons transferred to an international custodial arrangement. The LAF is the nominal enforcement instrument with an international force providing the actual security architecture. Saudi Arabia and France lead reconstruction financing, with each using its role to anchor post-war influence.

Several factors keep this scenario from falling below the assessed probability floor. Trump's energy pause extension signals that Washington is not immune to oil price concerns. Iran's item-by-item negotiation posture keeps a channel open rather than collapsing talks entirely. Zamir's manpower warning introduces institutional pressure for a halt that could, under sufficient political conditions, translate into US leverage on Israel.

The probability is assessed at 10 to 15%, substantially lower than it would have been before Netanyahu's explicit communication to US officials that Lebanon is excluded from any deal. The US accepted this position. A reversal would require not merely a shift in circumstances but a direct confrontation between Washington and its primary regional ally, a confrontation the current administration has shown no willingness to initiate.

B. Scenario B: Frozen Buffer Zone, Occupation Without Agreement (60-70%, Most Probable)

This scenario requires no diplomatic breakthrough. It is the default outcome if the current trajectory continues without disruption.

The US-Iran track stabilizes the nuclear and energy files but does not include Lebanon. No Lebanon linkage is accepted. The diplomatic and military tracks continue operating independently, as they have throughout March. Israel completes the buffer zone. Netanyahu's March 29 expansion order is already underway. The IDF declares an indefinite "security zone." Israeli officials have stated operations could last months or years. Israeli defense officials confirmed on March 29 that the IDF does not plan to withdraw from Lebanese territory even if a ceasefire agreement is reached.

Hezbollah shifts to a sustained harassment insurgency against Israeli holding positions. Report 1 documents the organizational basis for this shift: hundreds of Radwan fighters operating in small cells across approximately 200 villages, the introduction of IED tactics, FPV drone innovations, and the construction of defensive harassment lines. The Lebanese government's UNSC filing becomes the foundation of a years-long international legal campaign for Israeli withdrawal, operating through the same mechanisms that produced UNSCR 425 in 1978, a resolution that took 22 years to produce Israeli withdrawal.

This scenario is assessed as most probable (60-70%) because it requires no active choice by any party. It is the trajectory produced by the continuation of existing conditions: US acceptance of Israel's position on Lebanon, Israel's commitment to the buffer zone, Hezbollah's subordination to Tehran precluding a separate Lebanese settlement, and the absence of any actor with both the leverage and the will to alter these conditions. The frozen buffer becomes de facto permanent through the same mechanism that produced the Golan Heights annexation: occupation in 1967, unilateral annexation in 1981, US recognition in 2019. Each year of occupation hardens the status quo.

This scenario can overlap with Scenario A if a partial US reversal produces a framework that freezes the current line without requiring withdrawal. It can also overlap with Scenario C if the frozen buffer generates escalatory dynamics that collapse the diplomatic vacuum into active confrontation.

C. Scenario C: Diplomatic Vacuum, Military Conclusion Without Any Framework (15-20%)

This scenario is triggered by the collapse of the Pakistan channel and the absence of any alternative diplomatic architecture. Plausible triggers include a Hezbollah mass-casualty strike or successful SAM shoot-down (two SAM engagements were confirmed in 48 hours during Week 4, indicating active pursuit of this capability). Israel responds with escalation north of the Litani, potentially to the Zahrani or Sayniq/Awali line. The conflict merges fully with the US-Iran confrontation as the distinction between the Lebanon front and the broader war dissolves.

In this trajectory, no diplomatic framework governs the Lebanese front at all. Lebanon becomes a sub-theater of a direct US-Iran confrontation, with its territory serving as a combat space for forces whose strategic objectives have nothing to do with Lebanese interests. The UNIFIL peacekeeper deaths on March 30 introduce a pathway that accelerates this scenario: continued peacekeeper casualties trigger NATO consultation among troop-contributing nations, potentially producing a withdrawal that removes the last international observer layer. Without UNIFIL's presence, the restraining effect of international witness disappears, and the cost calculus for Israeli expansion changes.

Hezbollah's assessed pursuit of IDF soldier abduction, assigned a 20 to 30% probability in Report 1 given current ground contact levels, could trigger a qualitatively different escalation. A captured Israeli soldier would generate domestic political pressure on the Netanyahu government that the current casualty rate does not produce. This potentially triggers an operational response that exceeds the buffer zone framework entirely.

ANALYTICAL ASSESSMENT

This scenario can operate simultaneously with elements of Scenario B. A frozen buffer in the west can coexist with active escalation in the east. Diplomatic vacuum in the bilateral US-Iran channel does not preclude local tactical arrangements at the UNIFIL level. The scenarios are layered because the conditions that produce each contain the seeds of the others: **a frozen buffer generates the insurgency that risks the escalation that collapses the diplomatic framework.**



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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.

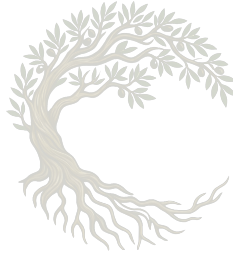
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