WEEKLY STRATEGIC ASSESSMENT

THE ESTIMATE

THE SITUATION IN LEBANON

CORE GROUP

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EXECUTIVE SUMMARY

This is the week the coupling between Lebanon's war and the United States-Iran endgame stopped being a negotiating position and became an exchange of fire. The war over Lebanon has been sliding out of Lebanese hands for weeks, gated by a negotiation Beirut does not attend and fought against a force Beirut does not command. What changed on 7 June is that the latent architecture went kinetic: Israel struck Beirut's southern suburbs with three missiles, the first strike on the capital since the 16 April truce, and Iran answered the same evening with its first direct missile salvo at Israel since April, retaliation for Beirut fired from Iranian soil. The American war ran on a separate axis and against a different grievance. After an Apache went down near Hormuz, US aircraft struck targets across southern Iran, the IRGC answered on American bases in Bahrain, Kuwait, and Jordan, and Iran declared the Strait of Hormuz closed to all shipping, while Washington pointedly said it gave no green light for the Dahiyeh strike and let an Iranian salvo at Israel pass unintercepted for the first time in the war. The week ended on a reversal as abrupt as its opening: Trump canceled a third strike round on 11 June after Qatari, Emirati, and Pakistani mediation and claimed a deal within days. Lebanon's file rode every swing of that arc without sitting at any of its tables.

The escalation was under-weighted, not unforeseen: this desk banded a collapse back to full war at 12 to 18 percent seven days ago, named the single Trump call holding the Beirut pause as its weakest element, and watched the path materialize within 48 hours, the cost of treating Hezbollah's northern restraint and the Dahiyeh red line as stable equilibria while the indicators on both were turning.

The exchange rewired the war's deterrence architecture, on evidence that is one salvo deep. For two decades the Beirut-for-Tel-Aviv equation ran through Hezbollah. This week it ran through Tehran: Iran, not Hezbollah, retaliated for the Dahiyeh, and the IRGC has framed any wider Lebanon campaign as grounds for a larger salvo. The competing read survives a single data point, that Iran fired for Beirut while already at war with Israel and the retaliation was incidental to its own fight rather than a standing commitment to Lebanon. A second cycle in either direction would settle it. Until then the coupling protects Beirut provisionally and prices Lebanon's quiet into a negotiation between other capitals. The 4 June framework is dead in all but name: Berri formally rejected the pilot zones on 9 June and countered with a point-for-point parallel withdrawal, no second zone changed hands, and the IDF pressed its ground push to the outskirts of Nabatieh and through Wadi Saluki while ordering the full evacuation of Tyre.

Beneath the external swing, the internal fault line moved upstream of the disarmament file. Aoun and Salam publicly told Tehran to stop interfering in Lebanon while Hezbollah told the government to repair its ties with Iran and its constituency rallied for Tehran in the Dahiyeh twice in three days. Before any disarmament order exists, the war has forced the prior question into the open: whose war is Lebanon in, and who decides.

The paramount question this cycle is whether the instrument Washington claims is days away carries Lebanon terms Iran can enforce, ending the southern campaign as part of the regional settlement, or whether Lebanon is the open front the deal leaves behind, with the Dahiyeh-for-Iranian-missiles coupling armed and the ground codification running underneath it.

CRITICAL QUESTIONS

- Does the claimed weekend signature materialize, and does its text name an Israeli withdrawal from Lebanon with sequencing?

- Does Israel strike the Dahiyeh a second time, and does Iran answer again, confirming the new coupling as standing rather than demonstrative?
- Does the Aoun-Hezbollah split over Iran harden into a cabinet-level crisis while the external war swings?

I. MILITARY AND SECURITY THEATER

The Dahiyeh strike and what it triggered. Israel struck Beirut's southern suburbs on 7 June with three missiles, killing two and wounding eleven, the first strike on the capital since the 16 April truce and the strike Netanyahu had twice weighed and deferred. Israel cast it as an answer to Hezbollah rocket fire on northern Israel, and that justification carries a finding of its own: Hezbollah's northern restraint, the one element of the arrangement it had observed since 1 June, broke this week. Projectiles fired toward Yiftah and Ramot Naftali were intercepted on 8 June, and two more fell near Israeli troops on 11 June as sirens sounded across northern communities. The exchange Hezbollah and Israel reopened did not stay theirs. Iran fired its first direct salvo at Israel since April within hours of the Dahiyeh strike, followed on 8 June with 22 to 24 ballistic missiles at the Nevatim and Tel Nof air bases and petrochemical sites in Haifa, and the war moved to a register no Lebanese actor controls.

The ground campaign did not pause for any of it. The IDF opened limited ground operations on the outskirts of Nabatieh on 8 June, using engineering robots to clear explosives ahead of what it frames as a decisive blow across the Litani-to-Zahrani belt, and its spokesman said operations would continue throughout Lebanon. By 12 June Israeli forces had taken the Wadi Saluki area and pushed operations north of the Litani, and a Golani battalion commander said his troops were prepared to advance on Beirut if ordered. The IDF ordered the evacuation of Tyre and its surroundings on 8 June and extended it on 9 June to the entire city, including the Christian quarter and the Palestinian camps, then struck the city through the week, killing at least 11 on 10 June and damaging the World Heritage archaeological zone. On 11 June Israeli strikes killed at least 17 across the south and hit the center of Sidon for the first time, the largest southern city and one largely spared until now. The week's pattern is the codification logic that has run since the Litani crossing, executed at higher tempo: the truce talk runs above, the belt consolidates below.

Hezbollah's posture: degraded, coupled, still firing. Hezbollah sustained its campaign against the force inside Lebanon. It struck an Israeli artillery position at Adaisseh with suicide drones on 6 June, hit logistics vehicles and a bulldozer at Yohmor on 8 and 9 June with Ababil and Abarim drones, released footage of strikes near Beaufort, Khiam, and Haddatha, and on 10 June a fighter penetrated the border fence and opened fire on troops inside northern Israel before being killed, an infiltration the IDF treated as an embarrassment to its claim of control. Israeli losses since the renewed truce reached 17 soldiers and one contractor by 8 June, including a captain killed by an explosive drone. Against that, Lebanese security assessments describe the elite Radwan force as destroyed and the Aziz unit, its northern counterpart, as sharply degraded, and the IDF disclosed a multi-level command tunnel near Beaufort, built with Iranian assistance to house hundreds of operatives, now in Israeli hands. The capability picture is a force losing its formations and infrastructure south of the Litani while retaining the drone and short-range fire to make the occupation expensive. Its intent is assessed separately: Hezbollah is likely to hold to selective targeting of the force inside Lebanon rather than sustained cross-border escalation while

Iran carries the deterrence file, because the Iranian salvo now does what Hezbollah's own long-range fire once threatened, at a price Hezbollah does not pay.

The deterrence handoff. The week's structural military fact is that retaliation for Beirut came from Iranian territory, not from Lebanon. The IRGC's Khatam al-Anbiya headquarters tied any Israeli response or wider Lebanon campaign to a larger second salvo, and senior commanders formally requested authorization for that salvo from Supreme Leader Mojtaba Khamenei, which had not been granted by week's end. Smotrich answered the new equation with a proposal to the security cabinet to destroy 20 to 30 Dahiyeh buildings for every Iranian missile fired. Both sides have now stated the exchange rate they intend to impose. Whether the coupling is standing policy or a one-time demonstration is the single most consequential unknown on the board: it has fired once, and a second cycle would confirm it as the war's new architecture.

LAF and UNIFIL. An Israeli strike on the Khardali-Nabatieh road on 6 June killed Brigadier General Wissam Sabra, a captain, and a soldier, the most senior Lebanese Army officer killed in the war, as army commander Rodolphe Haykal departed for Pakistan. The army buried its dead, kept its positions, and entered no new zone, the pilot-zone mechanism it was staked to having stalled at Dbine. The killing fed a reading, advanced by the resistance axis, that Israel timed the strike against the Islamabad channel, a claim that fits Israel's routine targeting of the army without requiring the link. EU foreign policy chief Kallas demanded accountability for the Serbian peacekeeper killed last week while rejecting additional Hezbollah conditions, and UNIFIL's mandate wind-down proceeded without new incident this week.

CRITICAL QUESTIONS

- Does the IDF consolidate the Nabatieh-Wadi Saluki gains or continue toward Sidon and the coast, and does the Golani commander's Beirut statement acquire an order behind it?
- Does Mojtaba Khamenei authorize the second salvo the IRGC has requested, and against what trigger?
- Does Israel strike the Dahiyeh again at the Smotrich ratio, and does the American brake reassert itself before it does?
- Can Hezbollah keep its soldier-casualty rate above the threshold that contests the occupation while Radwan and Aziz formations degrade?

II. DOMESTIC POLITICAL LANDSCAPE

The framework the state signed is gone, and the state's counterproposal is on the table. Berri rejected the pilot zones outright on 9 June and demanded an unconditional, comprehensive ceasefire by land, sea, and air, telling the US ambassador the Shia duo is ready for a point-for-point withdrawal under which Hezbollah and Israel pull back from south of the Litani in parallel once a truce takes hold. That is the first concrete Lebanese counterproposal of the war, and it reverses the framework's sequencing: where the 4 June text required Hezbollah's evacuation first with no Israeli timetable, Berri's formula makes the two withdrawals simultaneous and mutual. Washington has not answered it. US Ambassador Michel Issa, meeting Aoun and Berri after the Dahiyeh strike, said Washington had decided the confrontation must not expand and called the strike a political message, language that manages escalation rather than advances a text. The fourth-round architecture of last week, two tracks and a serially extended pause, produced no fifth round this week.

Aoun's two-front week. The president held his line against Israel, refusing to meet Netanyahu until an agreement is signed and defining the goal as a non-aggression or security accord, and opened a second front against Tehran. In a televised interview he warned Iran against interfering in Lebanon's affairs, saying the people of Lebanon are being killed and their houses destroyed to serve Iranian interests, and on 11 June he rejected any return to the era of tutelages. He paired the rupture rhetoric with a credit to Berri for trying to persuade Hezbollah to disarm, a formulation that keeps the Speaker inside the state's tent while the state and Hezbollah pull apart over Iran. Netanyahu and Herzog amplified the same seam from outside, appealing to the Lebanese people to join Israel and reject Iran and Hezbollah, declaring Israel is not at war with them while its aircraft struck the south daily. The convergence of the Israeli appeal and the presidential rupture rhetoric hands Hezbollah its preferred frame, that the state's quarrel with Tehran serves the enemy's campaign, and the group used it within the day.

Hezbollah pushed back through the government, not against it. The group urged the cabinet to repair ties with Iran and benefit from Tehran's support, denied any direct channel to Trump after the US president claimed one had opened, and put its constituency on the street in the Dahiyeh twice in three days in support of Iran. It withdrew from none of its state positions and threatened no government exit. The posture is pressure inside the institutions paired with mobilization outside them, and it leaves the executive split on the war's central question at the moment the war's center of gravity moved to Tehran: the president says Iran's interference is killing Lebanon, the strongest armed actor says Iran is Lebanon's protection, and both claims gained evidence this week.

The cabinet's ledger and the Saudi opening. The cabinet logged 3,491 Israeli violations of the April ceasefire since 17 April, the state's running case file for any future negotiation. The week's one unambiguous gain came from Riyadh: Saudi Arabia lifted its five-year ban on Lebanese imports at the request of Aoun and Salam, crediting the government's moves to rebuild state institutions. The decision reopens the Gulf market to Lebanese agriculture, and its political weight exceeds its economic one, because it is the first material Saudi reward for the state-rebuilding course since the war began and it lands on the government side of the internal ledger, not Hezbollah's. The army commander's Pakistan visit, closing 9 June at Rawalpindi with a cooperation pledge and no agreement, sits in the same column as an external bet on the state's institutions, whatever the contested readings of its purpose.

CRITICAL QUESTIONS

- ◈ Does Washington answer Berri's point-for-point proposal with a written response, fold it into a fifth round, or let it lapse?
- ◈ Does the Aoun-Hezbollah split over Iran reach the cabinet table as a vote, a boycott, or a ministerial withdrawal?
- ◈ Does Riyadh follow the import-ban lift with a second step, an ambassadorial upgrade or a financial deposit, inside the month?
- ◈ Does the government convert its violations ledger into a formal complaint or negotiation annex, or does it remain rhetorical capital?

III. DOMESTIC SECTARIAN LANDSCAPE

The war reached the communities that had been spared. The IDF's full evacuation of Tyre took in the Christian quarter and the Palestinian camps, and Christian residents fled the city fearing the campaign would bar their return, with Christian leaders appealing for urgent international action and satellite imagery showing destruction across residential quarters and the UNESCO-protected zones. The first strike on central Sidon carried the war into the largest Sunni city of the south. The cost of the campaign, concentrated for months on the Shia south and the Dahiyeh, spread visibly across the confessional map this week, and that spread cuts two ways: it builds a cross-sectarian grievance against Israel, and it confronts each community with the question of whether Hezbollah's war protects it or exposes it.

The Shia street answered the alignment question first. Hundreds rallied in the Dahiyeh on 11 June and again on 12 June in support of Iran and its allies, days after Iranian missiles answered the strike on their neighborhoods. The demonstrations are the constituency's verdict on the week: Iran fired for the Dahiyeh when no one else did, and the state's simultaneous demand that Tehran stop interfering reads from inside the community as ingratitude at best and alignment with the enemy at worst. The duo's institutional behavior matched the street's. Berri's point-for-point proposal and his rejection of the pilot zones held the Shia negotiating position unified, and Amal moved nowhere apart from Hezbollah. The displacement burden, the detained, and the reconstruction-for-disarmament conditioning carried over unchanged, and each continues to argue inside the community for keeping the weapons.

The Christian blocs found their voice through Tyre. The sovereigntist camp that stayed muted last week was pulled into the war's center this week by the evacuation of a historically Christian city. The appeals from Tyre's Christian leadership internationalized the community's exposure, and Aoun's rupture rhetoric toward Tehran carried the operative Christian position into open confrontation with Hezbollah's frame. Bkerke and the party blocs issued no escalatory move beyond that, and the restraint is consistent: the sovereigntist camp presses the Iran question through the presidency rather than the street while the army cannot win the confrontation a street push would invite. Netanyahu's direct appeal to the Lebanese, pitched at exactly this seam, gives the camp an association it does not want, and the speed with which Hezbollah framed state criticism of Iran as service to Israel shows why.

The Sunni community absorbed its first direct blow. The strike on central Sidon ends the relative immunity of the Sunni urban south. Salam's posture, denouncing the Israeli campaign while co-sponsoring the Saudi opening with Aoun, holds the community's institutional weight with the state, and Dar al-Fatwa stayed off the alignment question. The community's wary neutrality persists, but the Saudi import-ban lift gives its commercial class a material stake in the state-rebuilding course for the first time since the war began, a quiet counterweight to the resistance frame.

The Druze stayed silent, and the silence still reads as positioning. Jumblatt issued no public move for a second consecutive week while the war swung. His standing alignment with the state and the army holds, and his community's geography keeps it outside the campaign's current axes. The next Druze signal will matter most if the internal alignment fight reaches the cabinet, where the PSP's weight swings coalitions.

Displacement is becoming demographic argument. The Tyre evacuation pushed a new wave onto a caseload above 1.2 million, and for the first time the displaced include a substantial Christian urban population alongside the Shia south's. The older Lebanese fear that displacement redraws the map now runs in more than one community, and the friction indicators to watch multiply accordingly: host-community strain where Tyre's Christians resettle, competition for shelter and aid across confessional lines, and the political use of return as a communal demand. The UN human rights chief's decision to send a war-crimes evidence mission to Lebanon gives every displaced community a shared documentary channel, and the state a rare instrument it did not have to build.

CRITICAL QUESTIONS

- Does the Tyre displacement produce an organized Christian political demand, a Bkerke statement or bloc initiative, that forces the war onto the Christian parties' agenda?
- Does the alignment split harden Shia opinion against the presidency, and does Hezbollah convert the Dahiyeh rallies into a standing mobilization?
- Does a friction incident at a shelter or host community cross the confessional line this week?
- Does the Sidon strike move Sunni institutional actors off neutrality in either direction?

IV. DIPLOMATIC AND REGIONAL VECTORS

The negotiation that gates Lebanon broke, fought, and reconvened in seven days. The Islamabad-brokered United States-Iran track collapsed into direct combat this week: US aircraft struck roughly 20 Iranian targets after an Apache went down near Hormuz, the IRGC answered on American bases in Bahrain, Kuwait, and Jordan, a second day of US strikes hit Hormozgan including water infrastructure, and Iran declared the Strait of Hormuz closed to all shipping. Trump then canceled a third strike round on 11 June after mediation by Qatar's Emir, the UAE's Mohammed bin Zayed, and Pakistan's Asim Munir, and put a signature within days, on terms covering a Hormuz reopening, a lifted port blockade, and Iranian access to more than 16 billion dollars in frozen funds. Tehran declined to confirm the timeline. Every prior Trump ultimatum since February has dissolved back into diplomacy on a similar arc, a base rate that argues for taking the claimed signature seriously, but the published terms carry no Lebanon clause, and that omission is the week's most consequential diplomatic fact for Beirut.

The coupling is no longer textual, it is demonstrated. Last week Lebanon's link to the Iran track rested on a memorandum clause. This week Iran fired for Beirut, and the IRGC tied any wider Lebanon campaign to its next salvo. Tehran's message, that no arrangement can be confined to the nuclear file and must address Lebanon and the regional balance, is now backed by the one currency the table respects. The coupling remains reversible in the other direction: Tehran decoupled Lebanon once before, in March, when linkage was a liability, and a Tehran that secures its funds and its strait while Israel grinds down Hezbollah has every incentive to sell the coupling again. The absence of Lebanon from the reported deal terms is the indicator that the sale is under way. Which way Tehran spends the coupling, enforcement or trade bait, is the master variable for every Lebanese outcome this cycle.

Washington and Israel diverged in public. Washington said it gave no green light for the Dahiyeh strike, US forces did not intercept the Iranian missiles fired at Israel overnight on 8 June, a break from every earlier round, and Vance said openly that US and Israeli interests diverge and that Trump pursues the Iran deal over Israeli objections. Trump publicly cast doubt on Netanyahu's political future, and Likud answered by confirming his September run. The rupture is real and its Lebanon yield is so far nil: Washington could not stop the Dahiyeh strike, has not answered Berri's proposal, and has spent its restraint on Iran, not on the southern campaign. The binding constraint on the southern campaign has loosened from Israeli intent under American cover into Israeli intent under American distraction, which restrains

Israel less, not more.

The Gulf umbrella became the war's broker. The Doha channel Berri opened two weeks ago has been overtaken by a larger Gulf role: Qatar and the UAE, with Pakistan, turned Trump off the third strike round, and Saudi Arabia made its first material move toward Beirut in five years with the import-ban lift. The Arab capitals condemned Iran's strikes on Kuwait, Bahrain, and Jordan in a unified front, which constrains how far they will carry Tehran's case, but their exposure to a closed Hormuz makes them the actors most invested in the deal that would also be Lebanon's off-ramp. The Arab umbrella over Beirut is acquiring substance, and its test is whether any Gulf capital ties its mediation or its money to Lebanon terms, the import-ban lift being the first datum on that line. France stayed marginal, consumed by its Palestinian-statehood conference, and the EU's Lebanon presence remained the LAF support package and Kallas's UNIFIL accountability demand.

Syria entered the board as a potential party. Trump said Syria could help in the war against Hezbollah and endorsed a more surgical offensive, praising al-Sharaa, while Damascus held to its declared neutrality. No Syrian action followed, and none is needed for the signal to matter in Beirut: an American president floating Syrian participation against Hezbollah converts Lebanon's eastern border from a humanitarian seam into a potential second front, and it gives Hezbollah a further argument that the state's Western alignment invites encirclement. The Masnaa crossing kept moving people and goods, and no border incident followed the rhetoric.

CRITICAL QUESTIONS

- Does the signed instrument, if it lands, name Lebanon, and does Iran condition its signature on a Lebanon annex or sign without one?
- Does CENTCOM halt its tanker interdictions, the observable that distinguishes a real pause from a rhetorical one?
- Does any Gulf capital attach Lebanon terms to its mediation, a reconstruction pledge, a deposit, or a ceasefire clause, inside 14 days?
- Does Damascus answer the American invitation with any operational step against Hezbollah's eastern corridor?

V. HUMANITARIAN AND INFRASTRUCTURE STRAIN

The casualty ledger crossed new thresholds. The Health Ministry put the toll since the 2 March resumption at 3,666 killed and 11,321 wounded by 10 June, and Israeli strikes killed at least 17 more on 11 June. The asymmetry of the ledger holds unchanged, a campaign whose cost falls almost entirely on the Lebanese civilian south, and the week added a category: the evacuation and bombardment of an entire coastal city. Tyre's population, including communities that had absorbed displaced families all war, became displaced itself, with at least 11 killed in the city on 10 June, ten hospital staff wounded in a strike on 12 June, and the World Heritage zones damaged on satellite-confirmed imagery. The strike on central Sidon extended the exposure to the south's largest urban center.

The medical system's southern anchor is now inside the fire. Last week the pattern was strikes near hospitals in Tyre and Tebnine. This week the city hosting Jabal Amel Hospital, the south's principal trauma center, was ordered emptied, and hospital staff were wounded at their posts. A hospital cannot evacuate and function, and the Tyre order forces exactly that choice on the facilities serving the entire southern coast. Hospital capacity south of the Litani is crossing from crisis into system failure by evacuation order rather than by direct destruction, a distinction without an operational difference for the wounded.

Displacement passed from flow into wave. The Tyre and Sidon-area orders pushed a fresh wave onto the standing caseload above 1.2 million, the first wave with a substantial Christian and Sunni urban component, and the mined and demolished border belt continues to foreclose return behind it. The one-way chain at work since the border villages were razed, emptied and mined ground hardening the territorial line and stripping the disarmament demand of its footing, extended this week to the coastal cities. Shelter strain where the Tyre wave lands, in Saida's remaining safe quarters, in Beirut, and in the Chouf, is the immediate watch.

The supply lines held, and the external shock arrived anyway. Beirut's airport and port stayed operational and the Masnaa crossing kept moving. The strain this week came through prices, not blockade, and it has two distinct layers. The standing layer is the Hormuz disruption that has run since March, more than 100 days of constrained flows that have lifted oil more than 50 percent and already sit inside Lebanon's April inflation print, transport at 33 percent year on year and housing and energy at 26 percent. The new layer is Iran's 11 June declaration of a total closure, which with the US-Iran exchange swung Brent between 89 and 96 dollars inside the week and repriced jet fuel and shipping insurance on top of the existing premium. Lebanon imports effectively all of its fuel by sea. The transmission read therefore turns on whether the closure declaration holds: if it does, the step from disruption pricing to closure pricing reaches the generator economy, the bakery diesel chain, and the cost of every imported staple within weeks, and if the claimed deal reopens the strait, the standing premium is what unwinds. Against that, the lira held at 89,500 to the dollar, Banque du Liban's gold holdings remain the balance sheet's anchor, and the Saudi import-ban lift reopens the Gulf market to Lebanese agricultural exports, the first positive external economic signal of the war. The economy remains stable on paper and draining underneath, and the drain accelerated this week with the displacement wave and the energy repricing.

Reconstruction conditioning held through the escalation. Washington's linkage of reconstruction funding to disarmament progress survived the week unchanged, and the war-crimes evidence mission announced by the UN human rights chief is the first international mechanism of the war aimed at documentation rather than relief. The displaced wave from Tyre and Sidon widens the constituency for reconstruction across confessional lines, which raises the political price of the conditioning for the state without changing the policy that imposes it.

CRITICAL QUESTIONS

- Does Jabal Amel or another southern hospital cease operations under the evacuation orders, the system-failure threshold?
- Where does the Tyre wave shelter, and does its absorption produce the first cross-confessional friction incident?
- Does the Hormuz closure hold long enough to move Lebanese pump and generator prices, and what is the time-to-shortage on subsidized bread diesel if Brent holds above 95?
- Does the airport or port come under strike or closure as the regional exchange continues?

VI. INDICATORS AND WARNINGS

Military Indicators

- Israel strikes the Dahiyeh a second time, and Iran fires a second salvo in answer, confirming the coupling as standing architecture.
- Mojtaba Khamenei's office authorizes the IRGC's requested salvo, observable within hours through Khatam al-Anbiya's announcement channel.
- The IDF crosses the Zahrani toward Sidon or the coast, or an order materializes behind the Golani commander's Beirut statement.
- A second deliberate Israeli strike on uniformed Lebanese Army personnel inside 14 days, the standing tripwire after the 6 June killing of Brigadier General Sabra.
- Hezbollah long-range fire reaches the Haifa area, re-entering the war it has delegated to Iran.

Political Indicators

- Washington delivers a written response to Berri's point-for-point withdrawal proposal, or convenes a fifth round on any terms.
- The cabinet takes up Lebanon-Iran relations as an agenda item, or a Hezbollah-aligned minister boycotts or withdraws over the presidency's Tehran rhetoric.
- Riyadh follows the import-ban lift with a second concrete step, an ambassadorial return, a deposit, or a reconstruction pledge.

Sectarian Indicators

- Bkerke or a Christian bloc converts the Tyre displacement into a formal political initiative or demand.
- The Dahiyeh rallies grow in scale or acquire an armed or uniformed component.
- A shelter or host-community friction incident crosses confessional lines.

Diplomatic Indicators

- A signed US-Iran instrument is published, and its text names Lebanon, an Israeli withdrawal, or neither.
- CENTCOM halts tanker interdictions in the Gulf of Oman, the observable test of a real pause.
- Damascus takes any operational step against Hezbollah's eastern corridor following the American invitation.

Humanitarian Indicators

- A hospital south of the Litani suspends operations under evacuation orders or strike damage.
- Lebanese pump or generator fuel prices move on the Hormuz closure, or the airport or port suspends operations.

WEEK-AHEAD STRATEGIC WARNING

The most dangerous convergence of the next seven days is a deal signed without Lebanon. If the weekend instrument lands carrying Hormuz, ports, and funds but no Lebanon clause, the last external brake on the southern campaign converts into permission: Tehran will have traded the coupling it demonstrated on 7 June, Israel will hold an American green light it has lacked since the Trump-Netanyahu rupture, and the force that has taken Wadi Saluki and ordered Tyre emptied will face a disarmed diplomatic board with a stated readiness to advance on Beirut. The second danger runs through the same gate in the opposite direction: a collapsed signature with Mojtaba Khamenei's salvo authorization pending puts the Dahiyeh and the Smotrich exchange ratio back at the center of the war within hours. The quieter risk underneath both is the southern medical system, which the Tyre evacuation has pushed to the failure threshold while attention sits on the regional swing. The decisive test of the week ahead is the text of whatever is signed, and the first thing to read in it is whether Lebanon is a party, a clause, or an absence.

CRITICAL QUESTIONS

- ◈ Is Lebanon in the signed text, and in what form?
- ◈ Does the coupling fire a second time in either direction before the signature lands?
- ◈ Does the southern hospital system cross from evacuation into suspension this week?

VII. SCENARIOS AND RISK ANALYSIS

These scenarios are overlapping layers of one reality, not a partition: they can co-occur, each carries its own falsifiable trigger, and the bands deliberately sum above 100 percent. They are governed by two variables: whether the US-Iran instrument lands and what its text says about Lebanon, and whether the Dahiyeh-for-Iranian-missiles coupling fires a second time.

Scenario A: The Open Front Under a Closing Deal — 45–60%

The US-Iran track produces a signature or a near-signature on Hormuz, ports, and funds while the Lebanon campaign runs on. Israel consolidates the Litani-to-Zahrani belt, completes the Tyre and Nabatieh operations, and keeps the Dahiyeh option holstered but live, while Hezbollah contests the occupation with drones and infiltration and Iran holds its second salvo in reserve. Lebanon's file is acknowledged in the diplomacy and absent from the enforceable terms, and the 4 June framework is quietly replaced by nothing. The drivers are Trump's investment in the deal, Tehran's priced need for its funds and its strait, and an Israeli campaign that no party has made the deal's condition. The implication is codification by default: the belt hardens, the displacement wave settles into permanence, and the disarmament demand waits at the end of a war that has not stopped. Probability assessment: 45 to 60 percent within the 14-day horizon, the most probable trajectory because it requires no actor to change course. Breaking condition: the published text of the instrument. A Lebanon annex with sequencing moves this scenario's weight to Scenario B within days, and a collapsed signature moves it to Scenario C.

Scenario B: An Enforced Lebanon Clause

10–20%

The instrument lands with Lebanon terms Iran conditions its signature on, an Israeli halt and a withdrawal sequence, possibly along the lines of Berri's point-for-point proposal, which is the only sequenced text on the table. Iran becomes the arrangement's de facto guarantor, the southern campaign winds down under deal discipline, and the LAF deployment question returns in a form Hezbollah can tolerate because the withdrawal is mutual. The evidence for the scenario is Tehran's standing insistence that any deal must cover Lebanon and the coupling it demonstrated on 7 June. The evidence against it is heavier and sits in this edition's own Section IV: the published terms carry Hormuz, ports, and funds and no Lebanon clause, Tehran has sold the coupling once before, in March, and the breaking condition that would raise this band, Iranian official language conditioning signature on a Lebanon annex, has not occurred. The constraint on the Israeli side compounds it: a command that frames the Litani-to-Zahrani push as a decisive blow still under way resists a stop order, and enforcement would require Washington to spend on Israel the pressure it has so far spent only on Iran. Probability assessment: very unlikely, 10 to 20 percent within the horizon. This is a live negotiation channel rated below 30 percent, so the revision indicator is named and watched: Iranian official language conditioning signature on a Lebanon annex forces the band up immediately, and a published draft without a Lebanon clause collapses it toward 5 percent.

Scenario C: Renewed Direct Exchange and the Dahiyeh Campaign

20–30%

The signature fails or another incident on the Hormuz pattern intervenes, Mojtaba Khamenei authorizes the pending salvo, and Israel answers in Beirut at or near the Smotrich ratio. The war returns to the direct state-on-state register of 7 to 10 June with the Dahiyeh as its Lebanese theater, mass displacement from the southern suburbs resumes, and the LAF and the government lose what mediating ground remains. The drivers are the authorization request sitting unanswered in Tehran, the strike-cancel-strike pattern Washington has run twice in one week, and an Israeli security cabinet with a stated exchange formula. The mitigating factor: every principal has demonstrated it prefers the deal to the war, and the Gulf mediators have shown they can turn Trump in hours. Probability assessment: unlikely, 20 to 30 percent within the horizon, rising past 50 percent if the weekend passes without a signature and the salvo authorization is granted. Breaking condition: Khatam al-Anbiya's authorization announcement, the single observable that converts this scenario from contingency to count-down.

Scenario D: Internal Alignment Rupture

15–25%

The Aoun-Hezbollah split over Iran hardens into a state crisis. The presidency's tutelage rhetoric and

Hezbollah's repair-the-ties demand collide at the cabinet table, Hezbollah-aligned ministers boycott or withdraw, the Dahiyeh mobilization becomes standing, and the army faces street-level friction along the 2008 template. The drivers are the alignment question the week forced open, Netanyahu's join-Israel appeal poisoning the state's position inside the Shia community, and a displacement burden that radicalizes faster than it integrates. The restraint is that every internal actor watched the external war swing this week and deferred: Berri held the duo to a negotiating posture rather than a confrontational one, Hezbollah kept its ministers seated, and Aoun paired his Tehran rupture with credit to Berri. Probability assessment: unlikely, 15 to 25 percent within the 14-day horizon, rising to 35 to 50 percent if a deal lands without Lebanon and the disarmament demand returns as the price of an Israeli halt, the sequence that would force the binary choice every actor has deferred. Breaking condition: a Hezbollah ministerial withdrawal or a cabinet vote on the Iran relationship, either of which moves the rupture from rhetoric to mechanism.

Scenario E: Humanitarian Cascade in the South

40–55%

The southern medical system crosses from evacuation into suspension, the Tyre and Sidon displacement wave outruns shelter capacity, and the Hormuz energy repricing reaches Lebanese fuel and bread within the month. The cascade is already partially realized: the Tyre evacuation order, the wounded hospital staff, and the wave onto a 1.2 million caseload are this week's facts, not projections. What converts crisis into cascade is the full convergence: a hospital suspension plus a cross-confessional shelter incident plus a fuel price shock in the same window, at which point humanitarian failure becomes the political destabilizer that feeds Scenario D and forecloses return permanently. Probability assessment: 40 to 55 percent within the horizon for that full three-leg convergence, the band sitting at roughly even rather than higher only because the third leg, the fuel price transmission, lags the closure declaration by weeks even if the closure holds. Breaking condition: Jabal Amel Hospital's operational status, the most load-bearing single facility on the board, and the first pump-price move in Beirut.

The decisive variable for the next seven days is the text Washington claims is days away. A signature with Lebanon terms pulls the field toward Scenario B and drains C and D, a signature without them locks Scenario A's codification and arms D's internal sequence behind it, and no signature at all puts C's countdown clock in Tehran's hands. The two observables that resolve it first: whether CENTCOM stops interdicting tankers, which tests the pause, and whether any published draft carries the word Lebanon, which tests the price Tehran actually charged for the coupling it demonstrated on 7 June.

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