
WEEKLY STRATEGIC ASSESSMENT

THE ESTIMATE

THE SITUATION IN LEBANON



CORE GROUP

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EXECUTIVE SUMMARY

This is the week Israel crossed the Litani and then accepted a ceasefire drawn around the ground it had just taken. Israeli forces seized Beaufort Castle on 1 June, the deepest penetration into Lebanon in twenty-six years and the first hold of the fortress since the 2000 withdrawal, and pushed the Golani, 7th Armored, Givati, and Fire brigades across the river toward the Zahrani. Israel now holds roughly one-fifth of Lebanese territory. Washington then announced a renewed conditional truce on 4 June requiring Hezbollah to evacuate the strip between the border and the Litani and the Lebanese Army to take exclusive control of cleared pilot zones, with no timetable for an Israeli withdrawal, the omission that doomed the 16 April truce. The territorial facts were set first, and the ceasefire was written over them rather than against them.

The truce was not inert. It produced the war's first reversal, a localized Israeli pullback from Dbine in Marjeyoun toward the Yellow Line, the reopening of the Marjeyoun-Hasbaya road, and the first Lebanese Army move toward the pilot zones, with Salam committing the army to deploy and Aoun calling the deal Lebanon's last chance. It produced no halt to the wider campaign. Israeli strikes killed eight people within hours of the announcement, Defense Minister Katz vowed to press on toward the coast, and Hezbollah, not a party to the talks, rejected the framework as a roadmap to annihilate part of the Lebanese people and routed its refusal to Tehran. The quiet over Beirut rests not on the text but on a single Trump call on 1 June that halted a planned strike on the Dahiyeh, a constraint that lasts only as long as Washington spends pressure on Netanyahu.

The week's deeper contest was over coupling. Washington is trying to settle Lebanon apart from the Islamabad-brokered United States-Iran negotiation, whose draft memorandum carries an end to the Lebanon fighting as one of its terms. Hezbollah, Iran, and Berri are refusing to let it. Berri sent his United States-sanctioned envoy Ali Hassan Khalil to Doha from 31 May, traveling with a Hezbollah envoy, to open an indirect Hezbollah-Washington channel through Qatar and to build an Arab umbrella with Saudi Arabia and Egypt against the Dahiyeh-for-the-south formula. Sending the sanctioned man, in the same week Washington designated two more of his circle to detach him from Hezbollah, was a deliberate refusal to decouple. The mediators have multiplied. The constraint has not, because it is Israeli intent under United States cover, and Qatar can shield Beirut without ending the war in the south.

Against the last assessment in March, the line has moved decisively. What was then a prospect, a permanent Israeli buffer in the south, is this week being codified, a ceasefire with no withdrawal clause written around ground Israel already holds. The buffer is no longer the goal. It is becoming the line a truce is built to preserve.

Beneath the external war runs the more combustible internal one. The disarmament demand that the United States and Israel press through the Lebanese state cannot be met without fracturing the army along its Shia component, and Hezbollah has warned, in the language of 2008, that it will treat the attempt as a move to destroy it. The same pressure that gates the ceasefire abroad threatens to break the Aoun-Berri-Hezbollah axis at home, and that internal rupture, not the air campaign, is the path on which a Lebanese-on-Lebanese clash becomes possible.

The paramount question this cycle is whether Lebanon can be decoupled and settled at its own table, with a Lebanese Army handover of the pilot zones that actually holds, or whether the southern war stays gated by the Islamabad track while the 4 June framework hardens into legal cover for a permanent Israeli belt to the Zahrani, with the disarmament demand driving the country toward an internal rupture in the meantime.

CRITICAL QUESTIONS

- ◆ Can the Lebanese Army enter and hold even one pilot zone while the zones remain under Israeli fire?
- ◆ Does the Islamabad-brokered United States-Iran track produce a signed instrument or break, and does Beirut's quiet survive either outcome?
- ◆ Does Berri's Doha track widen into an Arab-guaranteed settlement, or stall against Israeli intent on the ground?

I. MILITARY AND SECURITY THEATER

The crossing preceded the truce. Israel set the week's territorial facts before any ceasefire existed. On 1 June the IDF seized Beaufort Castle and its commanding ridge, the deepest ground penetration into Lebanon in twenty-six years and the first Israeli hold of the site since the 2000 withdrawal ended an eighteen-year occupation. The Golani, 7th Armored, Givati, and Fire brigades crossed the river into Dbine, Yohmor al-Shaqif, and Arnoun, pushing the line toward the Zahrani, roughly ten kilometers deeper, and treating the unilaterally declared 2026 Yellow Line as a start line rather than a limit. Netanyahu ordered the force to deepen its grip, Katz cast Beaufort as part of a standing security zone, and Israel now holds roughly one-fifth of Lebanese territory. On 29 May, days earlier, Israeli aircraft had struck Beirut for the first time in three weeks, hitting more than 135 targets. By the time Washington announced the 4 June truce, the deepest penetration of the war was accomplished and the agreement carried no clause to reverse it.

The first reversal, and its limits. The ceasefire produced one concrete military change: a localized Israeli pullback from Dbine toward the Yellow Line on 5 June, which let the Lebanese Army move up and reopen the Marjeyoun-Hasbaya road. That is the war's first ground reversal and the first test of the pilot-zone handover. It sat against an unbroken campaign everywhere else. Israeli strikes killed eight people and wounded fifteen within hours of the announcement, raids continued across the south and the Bekaa, and Givati forces operating north of the Litani killed a Hezbollah fighter and seized a weapons cache. An Israeli media report held that the military is weighing a strike on Beirut within days. The pullback is real. So is the advance it has not stopped.

The Dahiyeh threat and the American brake. On 1 and 2 June Netanyahu moved to strike Beirut's southern suburbs. Hezbollah leadership left Beirut and traffic streamed out of the Dahiyeh. A Trump phone call on 1 June halted the strike before execution, with Trump telling Netanyahu the escalation was isolating Israel and threatening the Iran negotiation, the same call in which he reportedly berated the prime minister. Israeli ministers revolted against the cancellation. The episode measured both Israel's readiness to break the Beirut-for-Tel-Aviv deterrence equation and the narrow American capacity to hold it back. The renewed report of a Beirut strike weighed within days shows the option was deferred, not abandoned.

Hezbollah operations. Hezbollah fired at the cadence of a long campaign. Its fighters killed at least three Israeli soldiers inside the window, Sergeant Rotem Yanai at Moshav Shomera on 29 May, Staff Sergeant Michael Tyukin of Givati on 1 June, and Captain Eitan Lemberg of the armored corps on 5 June, the last two by drone and anti-tank fire during the northward push. A Hezbollah drone struck

the command vehicle of Northern Command chief Major General Rafi Milo during a visit to the south. Milo had stepped away to meet sub-commanders and was unharmed, narrowly avoiding becoming the highest-ranking Israeli officer killed in the war. Cheap, mass-produced fibre-optic loitering drones, immune to jamming and adapted from the Ukraine war, are now Hezbollah's primary weapon, and they have slowed Israeli armored maneuver through the border belt. The group announced operations at Qantara, Yohmor, and around Beaufort, fired anti-tank missiles at troops entering Hadatha, and after the 1 June announcement held its cross-border fire on northern Israel while continuing to engage Israeli troops on Lebanese soil. That northern restraint is the one element of the arrangement Hezbollah has observed.

Degradation and its limits. The IDF assessed that Hezbollah has lost roughly one third of its pre-2023 manpower, and Milo himself acknowledged the difficulty of dismantling the group. The claim carries Israeli intent and sits against the observable facts: Hezbollah is still killing soldiers, nearly killed a regional commander, holds fire discipline along a contested line, and fields a new drone capability after 965 days. Its intent is assessed separately. Hezbollah is very likely to sustain selective targeting of the advancing force rather than open a strategic exchange while its leadership remains exposed in a penetrated south and its answer waits on Tehran.

LAF and UNIFIL. The Lebanese Armed Forces moved from bystander toward custodian this week, tasked under the framework with occupying the pilot zones and beginning at the reopened Marjeyoun-Hasbaya road, while still absorbing the war's cost, with two soldiers wounded by an Israeli drone strike on the Deir ez-Zahrani road. UNIFIL lost a Serbian peacekeeper on 5 June when mortar shells struck his position, the seventh Blue Helmet killed since March, with two others wounded, as the Secretary-General floats options for the mission and its mandate winds down. Neither force can alter the military balance, but the LAF is now the hinge on which the ceasefire's credibility turns.

CRITICAL QUESTIONS

- ◆ Does the IDF consolidate at the Zahrani or continue toward the Litani-to-coast line, and on what timeline?
- ◆ Can Hezbollah sustain its rate of soldier casualties and command-level strikes on the advancing force?
- ◆ Will Israel execute the Beirut strike it has now weighed twice, and what would remove the American brake again?
- ◆ Can the LAF physically occupy a pilot zone while it remains under Israeli fire?

II. DOMESTIC POLITICAL LANDSCAPE

The state signed for an outcome it cannot command. Lebanon, through President Aoun, accepted a renewed conditional ceasefire after a fourth round of US-mediated talks in Washington, and committed the Lebanese Army to deploy into the cleared pilot zones. The talks are the fourth in a sequence that began on 14 April with the first direct Israeli-Lebanese negotiations since 1983, and they run on two tracks kept deliberately separate, a political track on sovereignty and weapons and a security track that convened military representatives at the Pentagon on 29 May. The product so far is a seri-

ally extended pause, a ten-day truce stretched by three weeks and then by a further forty-five days on 15 May, each renewal buying time without halting the fighting. The state cannot deliver the halt it agreed to, because the party that must evacuate the Litani strip is not party to the agreement and rejects it.

Aoun's ceiling and Salam's posture. Aoun holds to a ceasefire plus, a halt and a non-aggression understanding that treats disarmament as a long-term internal process and defers any formal peace, and he refuses to meet Netanyahu while asserting the state's monopoly on war and peace. Prime Minister Salam committed the army to deploy and denounced the Israeli campaign as a scorched-earth policy. The Dbine pullback and the reopened Marjeyoun-Hasbaya road gave the government its first tangible result to point to, and also its first exposure, because a single zone the LAF cannot hold would discredit the mechanism the state has staked itself on. Aoun's ceiling is only as strong as the axis lets it be. His presidency carries no enforcement power of its own, it runs through Berri in parliament and the Shia bloc on the ground, so a state move against Hezbollah that Berri does not sanction is a declaration without a mechanism.

Berri refuses to be detached. Speaker Berri answered Washington's pressure by sending his United States-sanctioned aide Ali Hassan Khalil to Doha from 31 May, the political face the Treasury designated in 2020, in the same week the Treasury designated two more figures from his circle to pry him off Hezbollah. He offered to guarantee a full Hezbollah commitment to a ceasefire while insisting Israel halt first, a sequencing Washington judged evasive. The two moves are one posture: Berri will broker, but on the duo's terms and through the duo's hand, and the sanctions have not bought the realignment they were meant to buy. No settlement reaches implementation without the consent of the Amal-Hezbollah axis, and the axis is withholding it while routing its answer through Tehran and the Gulf rather than the Washington table.

The axis is the fault line. The Aoun-Berri-Hezbollah axis that holds the Lebanese negotiating position together is also the line along which the state could break. The danger is not that the Shia duo refuses to decouple, which it has, but that Washington or Israel forces the government to couple with the disarmament demand, putting Berri to a binary choice between his Christian and Sunni partners in the state and his Shia constituency and Hezbollah. His Doha move signals which way he would break. By sending the sanctioned Khalil rather than an unsanctioned proxy, Berri told Washington the pressure has not detached him and told Tehran and Hezbollah that the duo's channel still runs through its trusted hand. The rung above his circle is a direct United States designation of Berri himself, which members of Congress have already pressed for. That step would remove Lebanon's indispensable Shia interlocutor, split Amal, and collapse the architecture that has kept a unified Lebanese front at the table, the surest single trigger of an internal rupture.

External backing meets the enforcement gap. The European Union approved a new 100-million-euro support package for the Lebanese Army, tied explicitly to the ceasefire, an investment in the institution the framework relies on. The money underwrites the LAF's pilot-zone role but cannot give the army the combat freedom to enter zones under Israeli fire or the authority to disarm Hezbollah. International resources are flowing to a mechanism whose central precondition, Hezbollah's withdrawal, remains refused.

CRITICAL QUESTIONS

- ◆ Can Aoun, Salam, and Berri convert the pilot-zone handover into a sequence Hezbollah will tolerate short of disarmament?

- ◆ Does the first failed or fired-upon LAF deployment collapse the framework's credibility at home?
- ◆ Does Washington escalate the decoupling campaign to Berri himself, and how does the Shia bloc answer?
- ◆ Does EU and US backing for the LAF translate into leverage on Israel, or only obligations on Beirut?

III. DOMESTIC SECTARIAN LANDSCAPE

The disarmament trap. Israel cannot disarm Hezbollah by force, as two years of strikes and the current ground campaign have shown, so Israel and the United States press the Lebanese state to do it instead. That demand is the most dangerous internal dynamic of the week, because it routes the unresolved external war into Lebanon's own politics. Secretary-General Qassem rejected the 4 June framework as a roadmap to annihilate part of the Lebanese people and enslave the rest, the language of an existential threat, not a bargaining posture. Hezbollah will treat a forced disarmament as a move to destroy it, and it holds the means to answer inside Lebanon.

The capacity trap. The Lebanese Army is the binding constraint, and it cuts against the demand. The LAF is the one institution that still holds broad cross-sectarian confidence, but it cannot be ordered to seize Hezbollah's weapons in Shia towns without fracturing along its own Shia component, where officers would face a choice between their command and their community. The instrument Washington would use to disarm Hezbollah is the instrument a disarmament order would break. Pressing disarmament through the state therefore does not strengthen the state, it risks dissolving the one body that still functions across the sects.

The 2008 template. Qassem's 24 May warning that the population has the right to take to the streets to topple a government that moves against the resistance is not rhetoric, it is a reference to a play-book. In May 2008, when the government moved against Hezbollah's communications network, the group seized parts of Beirut, stood up parallel authority, and forced the decision reversed, all below the threshold of open war. The same option sits open now. If Beirut moves on the weapons, Hezbollah can make the Shia areas ungovernable for the state, ring government figures, and run parallel security without firing on the army at all, an internal coercion that lives between a frozen truce and a full war and that no current draft settlement can prevent.

The grievances that make disarmament impossible. Two running grievances harden the community against surrendering the weapons. Families of Lebanese detained by Israel during its incursions have lost faith in diplomacy and now read military pressure as the only lever that frees their relatives, so each detention strengthens the case for keeping the arms. And Washington has conditioned reconstruction funding on progress toward disarmament, which tells a displaced and bombed-out Shia south that the price of rebuilding is the surrender of its protection. Both convert the external war into an internal argument Hezbollah wins by default, because the state is offering its own community less security and less recovery than the weapons do.

Amal holds the line. The Shia bloc moved this week as one. Berri sent his United States-sanctioned aide Ali Hassan Khalil to Doha alongside a Hezbollah envoy and refused to decouple, even as Washington designated two more of his circle to pry him loose. The axis Washington counted on to frac-

ture has instead closed ranks under the disarmament threat, and Amal moves with the party, not apart from it.

The Christian blocs. President Aoun carried the operative Christian position, the ceasefire plus that accepts a halt and a non-aggression understanding but treats disarmament as a long internal process and defers any peace, with his refusal to meet Netanyahu and his call to end the war as the courageous course. The sovereigntist blocs that would press disarmament hardest, the Lebanese Forces under Geagea and the Free Patriotic Movement under Bassil, and the Maronite Patriarchate at Bkerke under Patriarch al-Rai with its standing demand that arms belong to the state alone, were muted this week. The quiet is itself a signal, the sovereigntist camp is not forcing the disarmament question while the war rages and the ceasefire is contested, content to let external pressure carry it and wary of owning a confrontation the army cannot win.

The Sunni community. Prime Minister Salam, the most prominent Sunni in the state, framed Israel's conduct rather than Hezbollah's weapons as the problem, denouncing the scorched-earth campaign while pressing for a halt. The broader community holds its characteristic wary neutrality, with no single figure commanding it and Dar al-Fatwa and Grand Mufti Derian staying off the disarmament question. The long memory of Hezbollah's 2008 turn on West Beirut and its years fighting in Syria sits beneath the caution, the community fears the group's arms and cannot challenge them, and with Gulf and United States backing less certain than in past crises it has less room to.

The Druze. Walid Jumblatt, the leader who reads the balance of forces more keenly than any other Lebanese actor, was quiet this week. His standing posture aligns the community with the state and the army and against any slide into a fight it cannot survive, and the silence reads as a wait to see which way the ceasefire and the Iran track break before he commits.

The deterrence equation is eroding. For two decades the Beirut-for-Tel-Aviv equation underwrote Hezbollah's posture. Israel's move against the southern suburbs on 1 and 2 June, the leadership's flight from Beirut, and the standing report of a Beirut strike weighed within days have tested that equation in public. The community is absorbing the possibility that the deterrent no longer holds, which raises both the pressure on Hezbollah to demonstrate resolve and the risk that it does so through escalation.

Displacement concentrates the strain. The war's human cost falls disproportionately on the Shia south and the Dahiye, with more than 1.2 million displaced and the spread of landmines and unexploded ordnance across evacuated areas. The destruction of heritage sites at Tyre, Beaufort, and across the south registers as a cross-sectarian wound that Lebanese authorities have raised internationally. In the Sunni north, Tripoli faces a separate and worsening hazard of building collapses, compounding the sense of a state unable to protect. The renewed war pushed a fresh wave of Syrian refugees back across the border into a wrecked health system, adding to the roughly 3.5 million who have returned since the fall of Assad in December 2024. The concentration of displaced Shia families into shrinking safe areas revives the older Lebanese fear that displacement redraws the demographic map, and friction at host-community shelters is the low-level indicator to watch for that strain turning communal.

CRITICAL QUESTIONS

- ◆ Does pressing disarmament through the state fracture the Aoun-Berri-Hezbollah axis or force its deferral?

- ◆ If the deterrence equation is broken, does Hezbollah restore it through escalation or absorb the loss?
- ◆ Do displacement centers become flashpoints for inter-community friction?
- ◆ Does Qassem's topple-the-government threat translate into street mobilization if the disarmament demand is forced?

IV. DIPLOMATIC AND REGIONAL VECTORS

Washington brokers and tries to decouple. The United States authored the renewed conditional ceasefire and is trying to do two things at once, end the Lebanon fighting and separate it from the Islamabad-brokered United States-Iran negotiation, whose draft memorandum carries an end to the Lebanon fighting as one of its terms. The 1 June de-escalation insulated that larger track rather than settling Lebanon, with Trump halting the Beirut strike to keep Tehran at the table and posting immediately afterward that the Iran talks were continuing. The week exposed the limits of American leverage over its ally: Washington could cancel a single Beirut strike but could not stop the southern advance or secure a withdrawal clause.

The coupling axis, and its reversibility. The contest over Lebanon is at bottom a contest over whether to couple it to the Iran track or decouple it, and the positions are interest-driven and reversible. In March, when Trump's demand for Iranian surrender made linkage a liability, Qassem decoupled Lebanon and framed Hezbollah's fight as a sovereignty issue. By June, with the memorandum's withdrawal clause offering protection, the framing reversed, and Hezbollah, Iran, and Berri now press to keep the files coupled. Iran enters this assessment only through the Hezbollah gate, and through that gate the message is that Tehran will ratify no Lebanon settlement that leaves Israeli forces inside Lebanon. The duo's de-escalation posture followed an Iranian green light delivered to Berri by Mohammad Bagher Ghalibaf, head of Iran's delegation to the Islamabad talks.

What each Iran-track outcome does to Lebanon. The ceasefire's fate is gated by that larger negotiation, and its three outcomes point in different directions. If the memorandum is signed with the Lebanon-withdrawal clause intact, Israeli withdrawal becomes a term Iran can enforce, Tehran becomes a de facto guarantor of the Lebanese arrangement, and Berri's hand strengthens, with the Doha track then carrying Iranian backing rather than running parallel to it. If it is signed without a Lebanon clause, Lebanon is decoupled but unprotected, Trump's reason to restrain Netanyahu narrows, and the south freezes under Israeli control while the disarmament demand stays live. If the track breaks, the Beirut pause that rests on a single Trump call goes with it, the Dahiyeh-strike risk spikes, and the Washington and Doha channels alike lose their point. The coupling is not merely asserted, it is written into the memorandum text, so even a Washington that seeks to decouple may be unable to. And it is reversible by the actors: Qassem decoupled Lebanon in March when linkage was a liability and recoupled it in June when it turned protective, so a turn toward an unpromising Iran track is the leading indicator that he reframes again, toward escalation.

The Gulf track and the Arab umbrella. As the Washington table ground down to extensions, the mediation's center of gravity shifted toward Doha. Berri's envoy met the Qatari prime minister while Doha ran high-level contacts with United States officials, and the Emir took the Lebanon ceasefire into a direct call with Trump. Qatar's value is its reach, an open line to Washington, Tehran, Hezbollah, and the Arab capitals at once. The Khalil visit folds into a coordinated effort that pairs Qatar with Saudi Arabia,

whose envoy Prince Yazid bin Farhan has been in sustained contact with Berri, and Egypt. France, by contrast, has been marginalized, with envoy Le Drian arriving in Beirut to little effect as the file stays in United States hands. The umbrella's purpose is to give Lebanon a counterweight to the Dahiye-for-the-south formula it faces alone at the Washington table. Two limits define what it can do. If the Arab capitals press for the comprehensive halt and full withdrawal Lebanon seeks, they collide with Washington's narrower decoupling formula, and the open question is whether they convert that into leverage on Washington or are marginalized as France was. And the track may be as much signal as substance, with Berri using Doha to raise his price as the indispensable Shia interlocutor, demonstrating he carries Arab and Iranian weight, more than to negotiate a separate settlement.

More mediators, the same constraint. The widening diplomacy has not changed the balance, because the binding constraint is Israeli intent under United States cover, not the channel. Qatar can hold the ceiling, keeping Beirut and the southern suburbs off the strike list, without reaching the floor, the southern front where Israel holds the initiative. Running parallel to the talks, the United States, EU, and UK issued fresh sanctions designations on 2 June against Hezbollah-linked figures and exchange houses, and Washington holds reconstruction funding against progress on disarmament, the instruments Lebanon most needs set against the concession it is least able to make.

CRITICAL QUESTIONS

- ◆ Does the Islamabad track produce a signed instrument that carries the Lebanon withdrawal clause, or break and take the Beirut pause with it?
- ◆ Does the Doha channel move from a deniable line to an acknowledged mediation with material commitments?
- ◆ Will France or the EU convert objection into a concrete cost on Israel, or stop at statements and aid to the LAF?
- ◆ Does the UNIFIL mandate decision remove the last international presence on the line?

V. HUMANITARIAN AND INFRASTRUCTURE STRAIN

The casualty ledger is steeply asymmetric. Israeli strikes have killed more than 3,400 people, wounded more than 10,000, and displaced more than 1.2 million since the front opened on 2 March, against 24 Israeli soldiers and four civilians over the same period. More than 130 emergency and health workers are among the dead. The asymmetry is the analytic point: this is a campaign whose cost falls almost entirely on the Lebanese civilian south, and the spread of landmines and unexploded ordnance across evacuated areas is adding a casualty stream that will outlast any truce.

Displacement as an instrument, not a byproduct. Mass evacuation orders now precede the demolition of border villages, a sequence that empties the ground Israel then holds and works as a displacement instrument rather than a consequence of combat. Israel holds roughly one-fifth of Lebanese territory, and the barred zone below the Zahrani forces fresh movement on top of the existing caseload, with the localized return enabled by the Dbine pullback the narrow exception. Mined and demolished villages will block return even where the fighting stops. The chain runs one way. Emptied and mined ground cannot be reoccupied, so the Lebanese Army cannot take the returned zones the framework

assigns it, the territorial line hardens into a fact, and the disarmament demand loses its footing, because a south under Israeli control with no return leaves Hezbollah as the only force contesting it. Displacement is therefore not only a humanitarian cost, it forecloses the political settlement the same week's diplomacy is chasing.

The supply lines hold, for now. Lebanon's logistics stayed open this week. Beirut's airport is operational and took in foreign medical aid, the port is functioning, and the Masnaa crossing to Syria kept moving people. The strain is attrition, not blockade, a medical system struck where it stands, displacement faster than shelter can absorb, and recovery withheld at the table. The entry points are the indicator to watch, because a strike on the airport or the port would tip a survivable humanitarian crisis into isolation.

The medical system under direct fire. Strikes hit the medical infrastructure of the south as a category this week. Israeli fire struck near the MSF-supported Jabal Amel Hospital in Tyre, killing four and wounding 127, struck near Hiram Hospital wounding 13 staff the prior day, and threatened the Tebnine Governmental Hospital, the only hospital serving its area. Paramedics were killed at Chehour. The pattern places the health system south of the Litani at the center of the humanitarian failure, not at its periphery.

Reconstruction held hostage to disarmament. The Lebanese state has been largely absent from the humanitarian response, with municipalities, civil society, and diaspora networks carrying the burden, and Washington has conditioned external reconstruction funding on progress toward disarmament. That removes the one resource that might restore state credibility in the south and makes the money Lebanon most needs a lever at the table. The longer the conditioning holds, the harder the chain bites: no recovery in the south, eroding state credibility where the bombing fell hardest, and a vacuum Hezbollah fills as the de facto authority in the displaced and destroyed zones, which widens the internal fracture rather than the state's reach. The threshold to watch is the macro frame itself, the lira peg and the reserve cover, because a currency break would convert a slow erosion of state capacity into a fast one. On the macro frame, the lira held at roughly 89,500 to the dollar, April inflation ran at about 20 percent year on year led by transport at 33 percent, and Banque du Liban's gold holdings remain the balance sheet's anchor at roughly 47.7 billion dollars in value against foreign-currency reserves near 6.8 billion. Stable on paper, the economy is draining underneath through displacement, lost activity, and the cost of carrying the south.

CRITICAL QUESTIONS

- ◆ At what point does the loss of hospital capacity south of the Litani cross from crisis into system failure?
- ◆ Does the conditioning of reconstruction on disarmament foreclose recovery and harden the case for keeping Hezbollah's weapons?
- ◆ Can the lira peg survive a prolonged war footing and the fiscal cost of 1.2 million displaced?
- ◆ Do mines and demolition foreclose return to the south regardless of the ceasefire?

VI. INDICATORS AND WARNINGS

Military Indicators

- The Lebanese Army enters and holds a second pilot zone beyond Dbine, or is fired upon and forced to withdraw from one.
- Israel advances south of the Zahrani toward the Litani-to-coast line rather than consolidating.
- Israel executes the Beirut strike its media has now reported as weighed within days.
- Hezbollah resumes cross-border fire on northern Israel rather than confining its operations to Lebanese soil.

Political Indicators

- The pilot-zone handover extends to a published schedule, or stalls after Dbine.
- Washington designates Berri himself or a family member, escalating the decoupling campaign past his circle.
- A fifth Washington round yields a written deconfliction text rather than another extension.

Sectarian Indicators

- Friction at a displacement center produces a violent incident.
- Shia opinion turns against the leadership for entertaining the deal, or against the state for pressing it.

Internal Conflict Indicators

- A United States or Israeli disarmament deadline, or Washington explicitly conditioning reconstruction on weapons surrender.
- A Shia minister or a senior Lebanese Army officer resigns over disarmament orders.
- Hezbollah-aligned ministers or members of parliament withdraw from the government.
- An LAF pilot-zone deployment turns from a security handover into a weapons search.
- Hezbollah stands up parallel authority, checkpoints or security, in a Shia zone.
- The United States designates Berri himself or a member of his family.

Diplomatic Indicators

- The Islamabad track produces a signed instrument, or Tehran formally terminates its talks with Washington.
- Qatar publishes a readout of the Khalil channel or announces reconstruction commitments tied to a ceasefire.
- France or the EU announces a concrete measure against Israel beyond a statement.

Humanitarian Indicators

- A hospital south of the Litani closes for lack of safety or supply.
- Beirut airport or the port suspends operations.

WEEK-AHEAD STRATEGIC WARNING

The most dangerous convergence in the next seven days is an Israeli strike inside the Dahiye, weighed and deferred once already this week and reported as weighed again within days. Such a strike would break the one holding element of the arrangement, test Tehran's threat to treat a Beirut attack as a trigger, and collapse Washington's attempt to keep the Lebanon and Iran files apart, all at once. The quieter and more probable risk is that the Islamabad track stalls while the pilot-zone handover stops after the Dbine gesture, the barred zone below the Zahrani hardens into a permanent belt during the lull, and the territorial change becomes the fact a paper truce is written to preserve. The decisive test is whether the Lebanese Army can hold a single zone against an advance that has not paused.

CRITICAL QUESTIONS

- ◆ Does the LAF hold Dbine and take a second zone, or does the handover stall?
- ◆ Does Israel strike Beirut, and does the American brake hold a second time?
- ◆ Does the Islamabad track deliver or break before the late-June political track opens?

VII. SCENARIOS AND RISK ANALYSIS

These scenarios are layers of one reality, not alternatives. Attrition, territorial codification, humanitarian failure, and regional escalation can run in parallel and feed each other. They are governed by two variables, United States pressure on Israel and the state of the Islamabad-brokered Iran track.

Scenario A: Frozen Contested Truce

50-60%

The Beirut suburbs stay quiet under United States pressure while the southern campaign continues. Israel holds Beaufort and the captured belt, conducts strikes and clearances south of the Litani, and reserves the right to resume on Beirut, while Hezbollah holds its cross-border fire and keeps engaging Israeli troops on Lebanese soil. The Washington rounds and the Doha track extend the truce without closing the disarmament gap, and the Iran track stays live enough to keep Washington restraining Beirut strikes. This is the most probable path because it requires no party to concede its core position. It de-escalates at the margin and codifies the new line by inertia. Probability assessment: 50 to 60

percent within the 14-day horizon, the most probable trajectory, now anchored to a deeper line and a ceasefire that ratifies it.

Scenario B: Humanitarian Cascade

30-40%

Medical-system collapse south of the Litani, displacement past shelter capacity, and the mining and demolition of evacuated areas combine into a humanitarian failure that becomes a political destabilizer, sharpened by reconstruction funding held hostage to disarmament. The drivers are the direct targeting of hospitals, the 1.2 million displaced, and the foreclosure of return. The implication is that humanitarian failure, not military defeat, becomes the lever that forces the government's hand or fractures the home front. Probability assessment: 30 to 40 percent within the horizon, as the hospital-strike pattern and the displacement total deepen.

Scenario C: Permanent Territorial Modification to the Zahrani

45-55%

Israel consolidates the captured belt, one-fifth of Lebanon, into a permanent security strip to the Zahrani or beyond, the barred zone functions as a de facto annexed buffer, and the conditional ceasefire, by omitting any withdrawal timetable, supplies the legal cover. The drivers are the Beaufort capture, the Litani crossing, the barred-zone order, Katz's stated coast-line objective, and a framework that locks the new line rather than reversing it. This scenario has moved from prospect to the realized direction of travel, overlapping heavily with Scenario A. Probability assessment: 45 to 55 percent within the horizon, rising toward the upper bound if the pilot-zone handover stalls and Israel vacates no ground beyond Dbine.

Scenario D: Collapse Back to Full War

12-18%

The Islamabad negotiation breaks down, the protection its withdrawal clause offered Lebanon falls away, and the Beirut pause goes with it. Israel resumes strikes on the Dahiye, Hezbollah answers with the cross-border fire it has so far withheld, and the front returns to the full two-sided exchange of the March-to-May period, with the risk of direct Iranian re-entry through the Gulf fronts already active against Kuwait and Bahrain. The drivers are the twice-weighed Beirut strike and the fragility of a pause that rests on one Trump call. The mitigating factor is that both Washington and Tehran have invested in keeping the Iran track alive, and Tehran kept its indirect channel open this week rather than severing it. Probability assessment: 12 to 18 percent within the horizon, with the Beirut-strike option live and the Gulf front active, but held down by the continued investment in the Iran track. It becomes the most probable path quickly if that track fails.

Scenario E: Internal Political Rupture

15-25%

A forced disarmament deadline, or Washington conditioning reconstruction explicitly on weapons surrender, pushes the government to choose between complying and fracturing. The Aoun-Berri-

Hezbollah axis breaks, Berri siding with his Shia constituency over his state partners, Hezbollah-aligned ministers withdrawing, and the Lebanese Army at risk of splitting along its Shia component if ordered to disarm. Hezbollah needs no full war to prevail here. The 2008 template is parallel authority in the Shia areas, government figures ringed, and the state made ungovernable below the threshold of open battle, with a limited Army-Hezbollah or intra-Lebanese clash possible at the edges. The drivers are the disarmament demand, the reconstruction-for-disarmament lever, and a direct United States designation of Berri. This differs from Scenario B, which is passive systemic failure, because here the rupture is a deliberate Hezbollah move to pre-empt disarmament. Probability assessment: 15 to 25 percent within the 14-day horizon, held low because deferral is every party's default and none has yet forced the choice, rising to 35 to 45 percent if Washington sets a hard disarmament deadline or the Islamabad track breaks and Israel presses disarmament as the price of withdrawal.

Cross-Scenario Summary

Across all five, the common escalation driver is an Israeli strike on Beirut, and the common de-escalation driver is a real pilot-zone handover paired with an Islamabad instrument that carries the Lebanon withdrawal clause. Two gating variables set the board: whether that Islamabad track holds, and whether Washington keeps spending pressure on Netanyahu. A signed memorandum that keeps the withdrawal clause pulls the field toward de-escalation and lifts Scenario A and the graduated end of C, because Israeli withdrawal then becomes a term Iran enforces rather than a concession Israel can refuse. A memorandum signed without it, or a track that breaks, drops the field toward Scenarios D and E, because the Beirut pause loses its sponsor and the disarmament demand stays live with no withdrawal to trade against it. The near-term tactical tell is narrower and observable now: whether the Lebanese Army can enter and hold even one pilot zone against an advance that has not paused. If it can, the framework is a handover and the external scenarios soften. If it cannot, the truce is a label, the Zahrani belt hardens, and the disarmament demand keeps routing the external war toward the internal one, which is the bridge from Scenario A to Scenario E. Everything else this cycle is downstream of the Iran track and that one zone.



CORE GROUP

ABOUT CORE GROUP

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

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

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