
SOURCE FILE

THE CONVERGENCE GAP

THE NINE MEDIATION TRACKS AROUND LEBANON AND
THE SINGLE ENFORCEMENT QUESTION NONE OF THEM AN-
SWERS



CORE GROUP

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KEY JUDGMENTS

KJ-01 HIGH CONFIDENCE

Lebanon sits in the densest diplomatic field of the war. Nine concurrent tracks converge on a Lebanese settlement, and not one holds an instrument that binds Israeli behavior on the ground. Convergence is broad and the enforcement floor is empty. The alternative, that some track does carry a named mechanism, a deadline attached to a consequence, a guarantor commitment, or a deposited Lebanese position, is absent across the field rather than merely unbuilt: the de-confliction cell is announced and not operational, the Islamabad memorandum carries no Lebanon enforcement annex, and the pilot-zones concept is stuck at the map.

KJ-02 HIGH CONFIDENCE

The only signed instrument in the field, the Islamabad Memorandum of Understanding, names Lebanon in the strongest treaty language of the war and has changed nothing on the line. Point 1 of the 14-point text calls for the immediate and permanent termination of military operations on all fronts, including in Lebanon. The clause is present in the text and absent from the enforcement. Defense Minister Katz states the Israel Defense Forces will not withdraw even on an American demand, and Israeli strikes continued through 24 and 25 June, which is less consistent with any reading of the clause as a slow-acting provision maturing over the 60-day window.

KJ-03 MEDIUM-HIGH CONFIDENCE

The Washington direct table is the only venue where a Lebanon-Israel withdrawal can be negotiated, and the pilot-zones concept is the only operational pathway on offer. Both are stuck. Four rounds failed to produce a permanent ceasefire and a volatile fifth opened on 23 June, and the pilot-zones idea carries an unresolved contradiction in which the concept is reported as agreed while Israel has rejected more than ten Lebanese location proposals.

KJ-04 MEDIUM CONFIDENCE

The nine tracks tier sharply by what each can bind: one signed instrument, one live negotiating table, one announced-only enforcement mechanism, two concluded channel-openers, two political-backing umbrellas, one planning-phase post-UNIFIL force, and one unstructured Syria bilateral. Treating them as co-equal mediators overstates the field's capacity to deliver a withdrawal. The tier degrades thread by thread, and seven of the nine venues hold no instrument over Israel at all.

KJ-05**MEDIUM CONFIDENCE**

The binding near-term constraint on a Lebanese withdrawal has moved inside Washington. US domestic limits on the Iran war, the 50-48 Senate war-powers vote of 24 June, the 87.6 billion dollar supplemental request, and the reported restraint placed on Israel, narrow the consistency of the one lever every track ultimately routes through. A reported Rubio-Vance split over whether Iran belongs in the de-confliction cell would narrow it further, though that divergence is analysis-grade and not yet confirmed in an on-record US readout.

I. SCOPE AND KEY ASSUMPTIONS

This assessment rests on three linchpins. First, the Islamabad memorandum stays in force and its Lebanon clause stays nominally live through the forecast horizon, because Tehran does not walk the unenforced Lebanon provision and the 60-day sanctions waiver, valid to 21 August 2026, holds the structure together. Second, the Washington direct table remains the only venue where a Lebanon-Israel withdrawal can actually be negotiated, and the other eight tracks enable, pressure, backstop, or prepare the aftermath without substituting as the negotiating mechanism. Third, Israel retains the military initiative and the held belt, a zone reaching roughly ten kilometers into Lebanon across about one-fifth of Lebanese territory under occupation, and faces no enforcement instrument from any track beyond US persuasion, which Katz has said publicly will not move the IDF. Each linchpin is subject to revision, and the Indicators to Monitor specify the developments that would force a rethink. The outside view anchors the central call: multi-venue mediation of an active occupation, where the occupying power holds the ground and faces no attached enforcement instrument, typically freezes the line at a negotiated ceasefire rather than reversing the occupation, until either the occupier's cost calculus changes or an external guarantor deposits a binding commitment.

II. INTELLIGENCE

A. Nine tracks, one question

The Contested Truce, this desk’s read of the 1 June arrangement, called it a US de-escalation announcement rather than a signed ceasefire, gated by the Iran negotiation. The record has confirmed the gating call and inverted the mechanism. The Islamabad memorandum landed on 18 June and named Lebanon in its strongest-ever form, which is the gating the earlier file anticipated. But the binding question has flipped from Lebanon being absent from the terms to Lebanon being present in the text and absent from the enforcement. The sibling file on the Washington table, The Lebanon Talks, then took that single venue apart at the node level. This file holds both prior calls and widens the frame. The question is no longer what one table produces. It is whether any of the nine venues now operating can convert a convergence that is unanimous on paper into a withdrawal Israel has refused.

Nine concurrent mediation and negotiation tracks now bear on Lebanon, compressed into roughly one fortnight in June 2026, and converging rhetorically on a Lebanese settlement. They do not weigh equally. The single question that orders them is who can compel the actor that controls the ground. Read against that question, the field separates into three tiers by what each track can bind: the instruments that touch enforcement or negotiation directly, the enablers and umbrellas that open channels or lend political backing, and the forward edges that address a phase the field has not reached or a relationship never formalized. The threads below are ordered by that tiering, and each closes on the same enforcement verdict, so the tier degrades visibly from the signed instrument down to the unstructured edge. The track-tier matrix indexes the nine threads that follow.

FIGURE 1

Nine venues, what each can bind: the field is broad and the enforcement column is almost empty

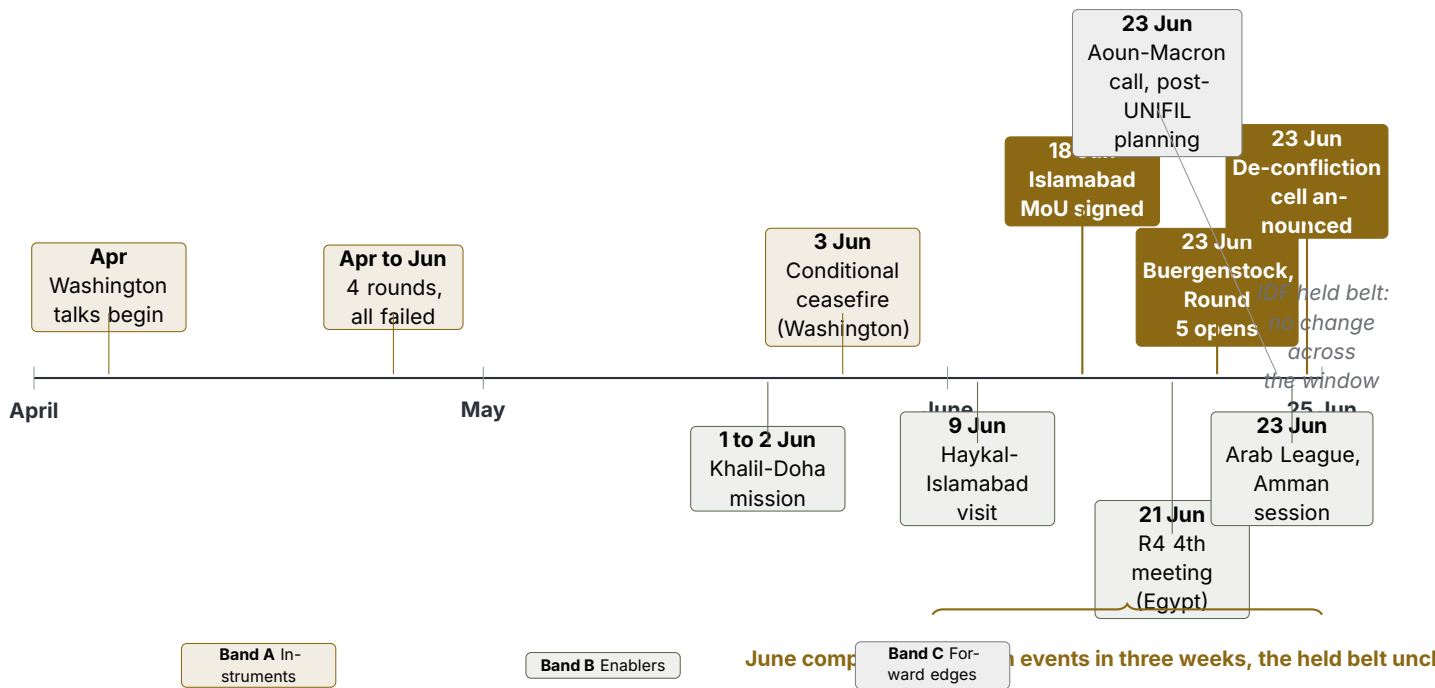
Three Track	Tier	Status	Binds Whom	Lebanon Enforcement Instrument	Lead Mediator(s)
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† The de-confliction cell is announced and not operational as of 25 June 2026. Three possibly distinct mechanisms travel under one label (the Buergenstock cell, the CENTCOM monitoring mechanism, and the joint US-Lebanese-Iranian cell discussed with Aoun on 24 June). Which of the three it is remains unconfirmed. Thread numbers in column 1 index the body.

Source: Multi-source reporting-grade. Washington round-5 anchored to canonical.events 39136 / 60173 / 60207. Khalil-Doha and Haykal-Islamabad anchored to intel-collection cases 20260605 and 20260609.

FIGURE 2

The diplomatic surge: nine tracks compressed into one fortnight, none of them moving the line



Band A instruments: Islamabad MoU / Buergenstock, de-confliction cell (announced 23 June, not operational), Washington direct talks. Band B enablers: Khalil-Doha, Haykal-Islamabad, R4 grouping, Arab League and Gulf. Band C forward edges: French post-UNIFIL (Syria-Lebanon engagement has no fixed event node and is not plotted separately). Gold-filled nodes mark the only signed instrument (18 Jun MoU) and the 23 Jun cluster (Buergenstock, Round 5, cell announcement, Arab League session). Round-5 nodes anchored to canonical.events 39136 / 60173 / 60207.

Source: Multi-source reporting-grade with DB corroboration for the Washington round-5 sequence.

Three tracks in the field touch enforcement or negotiation directly. They are the instruments, and everything below them enables, backs, or prepares.

B. The signed instrument: the Islamabad memorandum and the Buergenstock round

The United States and Iran signed the Islamabad Memorandum of Understanding on 18 June 2026 to end more than three months of war, the only signed text in the entire field. The 14-point memorandum opens on a cessation of hostilities on all fronts, with Point 1 calling for the immediate and permanent termination of military operations on all fronts, including in Lebanon. The first technical round convened at Buergenstock, Switzerland, led by US Vice President JD Vance and Iranian parliamentary speaker Mohammad Bagher Qalibaf. Originally set for 21 June, the round was delayed by Israeli strikes on Lebanon and proceeded on 23 June after a ceasefire announcement. The United States waived Iran sanctions for 60 days from 23 June, valid to 21 August, allowing Tehran to resume oil sales, and the two sides stood up working groups on nuclear issues and on sanctions.

Four disputes have opened since the signing. Rubio rejects an Iranian claim to charge tolls in the Strait of Hormuz and Tehran insists on it. Vance claims an agreement was reached on IAEA access and Iran's foreign ministry denies any new commitment. The disposition of

frozen assets is unresolved. And the Lebanon front, specifically how the cessation provision binds Israeli behavior, is the dispute this file turns on. In parallel, Oman hosted Iranian foreign minister Araghchi and Qalibaf on 23 June, and Iran and Oman agreed a joint working group on future Hormuz navigation. As of 25 June the memorandum is live but unresolved: Iran re-closed the Strait of Hormuz citing Israeli strikes on Lebanon after a brief reopening, and Araghchi has named the de-confliction cell the first real test of the memorandum's effectiveness.

What the memorandum binds on the Lebanese ground is nothing. It names Lebanon in the strongest treaty language of the war and carries no Lebanon enforcement annex. Katz states the IDF will not withdraw even on an American demand, and Israeli strikes through 24 and 25 June stand against any reading of the Lebanon clause as a slow-acting provision that will operate as the 60-day window matures.

C. The announced enforcer: the de-confliction cell

The Buergenstock joint Pakistan-Qatar statement of 23 June announced a de-confliction cell to oversee the cessation in Lebanon, comprising the United States, Iran, Qatar, Pakistan, and Lebanon, with Iran pressing specifically for a coordination mechanism for an Israeli withdrawal. Vance described the cell as overseeing adherence to the termination of military operations in Lebanon. The mechanism is the one track that, if it acquired substance, could become the enforcement instrument the rest of the field lacks.

It is not one clearly defined body. Three possibly distinct mechanisms now travel under overlapping labels, and the field cannot yet tell them apart. The Buergenstock statement announced the de-confliction cell. Rubio separately activated a CENTCOM-based monitoring mechanism after 20 June calls with Netanyahu and Aoun, to provide real-time information on the Lebanon fighting. And Vance and Rubio discussed a joint US-Lebanese-Iranian cell with Aoun on 24 June, referencing the Swiss communique. Whether these are one mechanism under several names or two or three separate bodies is unconfirmed. This is a named gap, not a detail to smooth: the analyst does not know which, says so, and assesses anyway. A reported Rubio-Vance split over whether Iran belongs in the cell sits on top of the ambiguity. That divergence is analysis-grade rather than an on-record US readout, and it is carried here as a contested edge, not as settled fact.

As of 25 June the cell is announced and not operational. It has no published charter, no named members, and no first working session. What it binds today is nothing. It is a label that could become the missing instrument, and until it acquires a charter, members, or a session, it is the field's largest open question rather than its answer.

D. The live table: the Washington direct talks

Direct Lebanon-Israel talks resumed for a fifth round in Washington on 23 June 2026, the only venue in the field where a withdrawal can actually be negotiated. The talks began in April, the first direct contact between the two states since 1993, and four rounds through early June all failed to produce a permanent ceasefire. The 3 June Washington agreement set a conditional ceasefire contingent on a complete Hezbollah cessation and the withdrawal of Hezbollah operatives south of the Litani. A Lebanese delegation led by LAF commander General Rodolphe Haykal opened the fifth round, and Aoun set its objectives on 23 June: a permanent ceasefire, an Israeli withdrawal on a short timetable, and pilot zones with security arrangements and an implementation mechanism. The round's first session ran into immediate volatility. The first session on 24 June produced no breakthrough, and on 25 June Rubio said the two sides were very close to a very positive declaration of intent, even as significant obstacles persisted at both the military and political levels. Both framings sit inside the same 48 hours and are held here together rather than resolved to one.

The pilot-zones concept is the only operational pathway on offer: designated southern zones from which the IDF phases out as the LAF deploys under American vetting, with the Army assuming sole security and barring Hezbollah. Its status carries an unresolved contradiction. The concept itself is reported as agreed, with the ceasefire extended. Aoun states that the designation of pilot zones remains under discussion, pending Israeli approval. Israeli officials state they rejected more than ten Lebanese location proposals. Agreement on the concept and no agreement on the map is the operative reading. Israel's ceiling is fixed: the roughly ten-kilometer belt, Katz's position that 200,000 residents will not return south while Israeli forces hold the zone, and Netanyahu's internal framing of full withdrawal as political suicide. Hezbollah condemns the talks and demands withdrawal first, with secretary-general Qassem stating on 23 June that withdrawal must follow a timetable and that Israel must withdraw from all Lebanese territory without retaining an inch. Rubio holds that the Lebanon track is separate from the Iran track. The direct-versus-indirect format contest and the internal recognition question that surround this table are the subject of the sibling file and are not re-litigated here.

What the table binds is the one place a withdrawal can be written into a text, and it is stuck precisely where a withdrawal becomes concrete, at the locations. A declaration of intent has been floated and not signed.

The next four tracks open channels to third parties or lend political backing. None of them carries an instrument over Israel.

E. The channel-opener to Iran: the Khalil-Doha mission

Speaker Nabih Berri dispatched his political aide Ali Hassan Khalil to Doha in early June 2026, around 1 to 2 June, an indirect Lebanon-Qatar-Iran channel that has since concluded. Khalil met Qatari state minister Mohammed bin Abdulaziz Al-Khulaifi and prime minister and foreign minister Sheikh Mohammed bin Abdulrahman Al Thani, accompanied by a Hezbollah envoy on an indirect track through Ammar Moussawi, in meetings held away from media at Berri's request. The stated purpose was de-escalation, a comprehensive ceasefire, and exploring Qatar's channels to Iran on the Lebanese file inside any broader US-Iran arrangement. The mission was timed to the fourth Washington round and to the Qatar-Saudi pressure campaign. A prior Riyadh leg is claimed and unconfirmed. Khalil carries an OFAC SDN designation that complicated the external optics without blocking the mission.

No official Qatari or Lebanese readout of the meeting content has been released, which leaves the channel's output undocumented rather than confirmed empty. What the mission binds is an indirect line to Tehran via Doha. It holds no instrument over Israel and produced no public deliverable.

F. The channel-opener to Pakistan: the Haykal-Islamabad visit

Lebanese Armed Forces commander General Rodolphe Haykal traveled to Islamabad around 6 to 9 June 2026 and met Pakistan's army chief General Asim Munir at GHQ Rawalpindi on 9 June, with a guard of honor and talks and no announced memorandum. The visit's purpose is contested. It has been framed as linked to Pakistani mediation, with Lebanon a critical part, and a Lebanese official has denied any negotiation link, stating the visit was planned over a month earlier. The released substance is regional security, defense cooperation, training, and institutional linkages, with Pakistan pledging to expand defense collaboration with the LAF, and the visit also touches the arms-support channel and a support path between Pakistan and the United States. Haykal stated on 21 June that the Lebanon-Syria relationship is good and that the LAF carries no sectarian identity.

The contested-purpose caveat holds: the observable substance is defense cooperation, and the mediation link is unconfirmed. What the visit binds is a tie between Pakistan, a named co-mediator of the Islamabad memorandum, and the LAF's arms-support channel. It holds no instrument over Israel.

G. The political umbrella at working level: the R4 grouping

The foreign ministers of Egypt, Pakistan, Turkey, and Saudi Arabia held their fourth consultative R4 meeting in Egypt on 21 June 2026, hosted by Egyptian foreign minister Badr Abdelatty, with Saudi foreign minister Faisal bin Farhan, Turkish foreign minister Hakan Fidan, and Pakistani foreign minister Ishaq Dar, one day before Buergerstock. The joint statement welcomed the Islamabad memorandum as a constructive step toward de-escalation, praised

Pakistan's role, and acknowledged Qatar. It called for a lasting, verifiable, and mutually acceptable solution covering the security and stability of the Gulf Arab states and the Levant, referencing Lebanon only through the Levant, with no dedicated Lebanon sub-file and no R4 Lebanon-mediator appointment. The R4 is distinct from the Pakistan-Qatar mediator pair named in the memorandum.

What the grouping binds is multilateral political cover for the memorandum. It holds no Lebanon mediation mandate and no instrument over Israel.

H. The political umbrella at summit level: the Arab League and the Gulf

Arab League foreign ministers convened the 165th Ordinary Session in Amman on 23 June 2026, where Jordanian foreign minister Safadi welcomed the Islamabad memorandum and backed advancing the Switzerland negotiations. Saudi Arabia and Qatar ran parallel pressure through May and June that gave Beirut cover in the Washington talks, and Rubio conducted a Gulf tour through the UAE, Kuwait, and Bahrain from roughly 23 to 25 June to manage Gulf concerns over the US-Iran deal and to reassure allies the deal would not undermine Gulf security. Jordan and six Gulf states were themselves struck by Iranian missiles during the war, which complicates their posture toward the memorandum.

What this layer binds is legitimacy and cover for Beirut. It holds no mediation mandate and no instrument over Israel.

Two tracks sit at the edges of the field. One reaches past a withdrawal that has not happened, and one was never formalized at all.

I. The forward edge for the aftermath: the French post-UNIFIL initiative

President Aoun and French President Macron spoke by phone on 23 June 2026 about the post-UNIFIL phase, the Switzerland results, and the G7 Evian outcomes. Macron indicated he would canvass several countries on maintaining a troop presence in southern Lebanon to replace UNIFIL, whose mandate expires at the end of 2026, and a French plan under discussion envisions a force of 2,000 to 5,500 personnel coordinated with the Lebanese state and international partners. Lebanon supports an international presence in the south after UNIFIL. The specific Security Council process needed to extend, replace, or conclude the UNIFIL mandate is absent from the current reporting, and whether any revision of Resolution 1701 is under active negotiation is unclear.

This track addresses the phase after a withdrawal that has not occurred. As of 25 June it is in planning, with no troop commitments secured and no Security Council pathway confirmed. What it binds is the aftermath of a withdrawal. It binds nothing on the withdrawal itself.

J. The unstructured edge: the Syria-Lebanon engagement

Trump called on or around 24 June 2026 for Syria to combat Hezbollah in Lebanon. Syrian President Ahmad al-Sharaa rejected any military intervention and ruled out a repeat of Syrian domination over Lebanon. In an Al-Mashhad television interview around 22 to 23 June, al-Sharaa outlined a different approach, economic corridors rather than military ones, support for Lebanese state institutions, brokering communication among Lebanese political forces including Hezbollah, and opposition to partial solutions, and set Syrian preconditions for any military role, among them full Israeli withdrawal from southern Syria and Lebanon, non-interference, military and financial support, US air cover, and an air-defense system. Lebanese prime minister Nawaf Salam called Syrian foreign minister Asaad al-Shobani around 22 to 23 June and praised al-Sharaa's positions. There is no Syrian troop build-up at the border as of 25 June, Washington retains significant influence over Damascus, and Damascus calculates economic opportunity from the war's disruption of trade routes.

This is an active public-positioning debate, not a defined negotiation channel with a mandate, format, or schedule, and it is the field's most over-claimable track. What it binds is nothing structured. It shapes the regional argument around Lebanon without holding any instrument over the withdrawal.

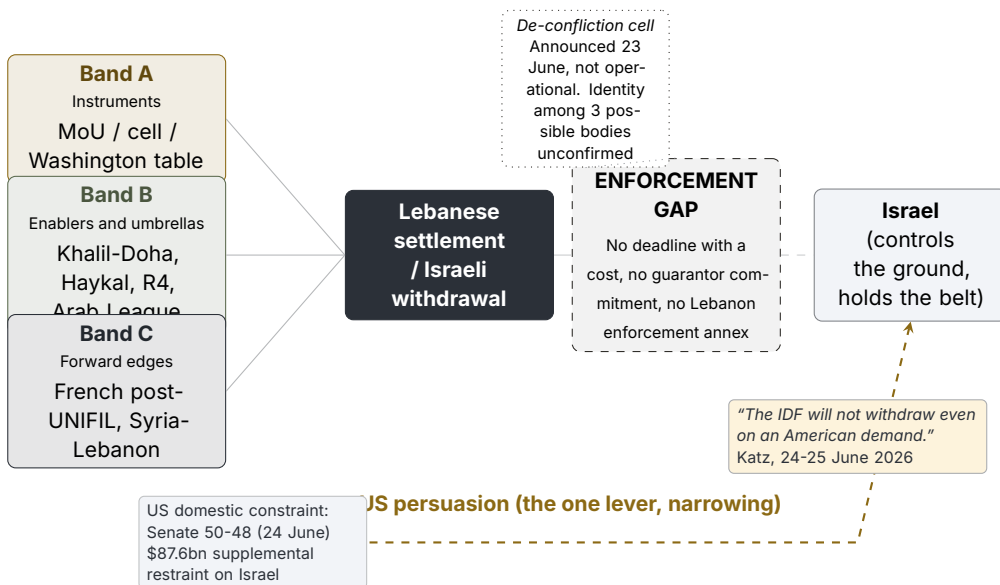
K. The enforcement question and the Washington constraint

Every thread converges on the same point and stops at the same wall. Nine venues bear on a Lebanese settlement and none of them binds the one actor that controls the ground. Seven of the nine hold no instrument over Israel by their own nature: the two channel-openers have concluded, the two umbrellas lend cover, the post-UNIFIL force addresses an aftermath that has not arrived, and the Syria engagement was never a channel. Of the two that could matter, the Washington table is stuck at the locations, and the Islamabad memorandum names Lebanon and enforces nothing. The one mechanism that could close the gap, the de-confliction cell, is announced and not operational, and which of three possible bodies it actually is remains unknown.

The single lever under the whole field is US persuasion, and that lever is narrowing. The 50-48 Senate war-powers vote of 24 June, the 87.6 billion dollar supplemental request of 25 June, and the reported restraint placed on Israeli operations since the memorandum reduce the room Washington has to spend on Lebanon. A reported Rubio-Vance split over Iran's inclusion in the cell, if it is real, would narrow the consistency of that lever from inside the administration. The de-confliction-cell ambiguity is the load-bearing gap in the field: the difference between a label and an operational enforcement body is the difference between the managed-freeze path and a phased withdrawal, and it is unresolved as of 25 June.

FIGURE 3

Convergence in, no instrument out: every track points at a settlement, none crosses the enforcement gap



The de-confliction cell (dotted box) is the one mechanism that could bridge the gap if operational. As of 25 June it holds no charter, no members, and no first session, and its identity among three possible bodies is unconfirmed. The dashed gold arrow is the only crossing vector, drawn thin to read as the narrowing lever. Tier-band colors match Figures 1 and 2.

Source: Schematic. Katz statement: Times of Israel via enriched pool, 24-25 June 2026. US domestic data: Senate roll call 24 June, Congressional Budget Office, 25 June 2026.

FIGURE 4

The gap between the parties on withdrawal: stated positions, and who holds a lever

Actor	Ceasefire Terms	Withdrawal (Timetable Demand)	Pilot Zones (Position)	Hezbollah Arms (When and How)	Enforcement Lever Held [†]
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[†] All cells are stated positions, not confirmed mechanics. The Hezbollah veto over the Lebanese delegation's cohesion and the bindingness of the Katz-Smotrich-Ben Gvir bloc on Israel's negotiators are both thin beyond public statements. The reported Rubio-Vance split over Iran's inclusion in the de-confliction cell is analysis-grade (single analytical source) and not an on-record US readout. It is carried as the contested edge of KJ-05.

Source: Multi-source reporting-grade. Washington round-5 sequence anchored to canonical.events 39136 / 60173 / 60207. Katz statement: Times of Israel via enriched pool, 24-25 June 2026. Qassem statement: Arab News, 23 June 2026.

III. STRATEGIC ASSESSMENT

Lebanon sits in the densest mediation field of the war and the floor under it is empty. Nine venues converge on a settlement, the field has compressed into a single fortnight, and the line has not moved. The threads above show why: seven of the nine tracks hold no instrument over Israel by their nature, the eighth names Lebanon and enforces nothing, and the ninth, the live table, is stuck where a withdrawal becomes concrete. The forecast below is a snapshot of that field at the 25 June cutoff, and it holds the day-to-day volatility of the Washington table rather than resolving it to one framing.

Assessment 1 HIGH CONFIDENCE

The diplomatic field is broad and the enforcement floor is empty, and the two facts are the same finding. Nine venues converge on a Lebanese settlement and none holds an instrument that binds the one actor controlling the ground. The mechanism is convergence with no attached consequence: Israel can absorb unanimous rhetorical pressure because no track has deposited a deadline with a cost or a guarantor commitment. An alternative explanation, that the de-confliction cell becomes that instrument once operational, is less consistent with the cell's unoperationalized status, its unresolved identity across three possible bodies, and the reported internal US split over its Iran membership. Confidence is HIGH because the absence of an instrument is confirmed track by track in the body rather than assumed, against a reference class in which unenforced multi-venue mediation of an active occupation freezes the line rather than reversing it.

Assessment 2 MEDIUM-HIGH CONFIDENCE

The Washington table most likely produces a deepened or extended ceasefire and a concept-level pilot-zones framework rather than a named-timetable withdrawal over the forecast horizon. The mechanism is concept-level agreement that dissolves at the map: the one operational pathway is stuck precisely where withdrawal becomes concrete, with the concept reported as agreed while Israel rejects more than ten location proposals and Aoun calls the designations pending Israeli approval. Confidence is MEDIUM-HIGH because the pathway and its blockage are both observed and the locations contradiction is unresolved, while the fifth round's volatility leaves room for a written declaration of intent that would update the call.

Assessment 3 MEDIUM CONFIDENCE

The proliferation of venues functions for Israel as time, not pressure. Each new track resets the diplomatic clock without attaching a cost to holding the line, so venue diffusion substitutes process for enforcement. This inverts the intuitive prior that more mediators

improve the odds, and the body earns the inversion: the reader has watched seven of the nine tracks close on no instrument over Israel. An alternative explanation, that the sheer breadth of convergence compels Israel within the 60-day memorandum window, is addressed in the alternative line below. Confidence is MEDIUM because the read is an interpretation of incentives rather than an observed Israeli statement of intent, and it would shift if any track attached a named cost to the status quo.

Assessment 4 MEDIUM CONFIDENCE

The binding constraint on a Lebanese withdrawal now sits inside Washington rather than in Beirut or Jerusalem. The United States holds the lever Israel needs, which is a statement about capability. Whether it pulls that lever on Lebanon is a separate question of intent, and the intent is politically bounded: the 50-48 Senate war-powers vote, the 87.6 billion dollar supplemental, and the restraint already placed on Israel narrow the room, and a reported Rubio-Vance split over the cell would narrow it from inside. Confidence is MEDIUM because the US-domestic constraint is well anchored while the cell split is analysis-grade, and the judgment would harden if that split surfaced in an on-record readout.

An alternative line runs against the whole assessment and deserves stating plainly. The strongest counter is that the breadth of convergence itself, the United States and Iran signing the memorandum, the Gulf and France and the Arab League backing it, will compel Israel within the 60-day window. That line is less consistent with the observable record: the convergence is rhetorical, Israel continued strikes through 24 and 25 June after the US restraint request, Katz stated the IDF will not withdraw even on an American demand, and no actor has attached an enforcement instrument or a deposited position to its diplomacy. The evidence favors the convergence-without-withdrawal reading because the one variable that would break it, an instrument with a consequence, is absent from every track.

The field moves along one of three paths over the next 60 to 90 days, ranked by likelihood.

Managed freeze, not withdrawal MOST LIKELY PATH

The ceasefire holds or deepens, the pilot-zones framework advances at the concept level, and no named-timetable withdrawal emerges. Israel holds the belt, the field stays dense, and the line stays fixed. This path dominates because no actor must concede its core and Israel pays no cost for holding.

Phased withdrawal begins LOWER LIKELIHOOD

A named southern pilot zone is agreed with a map, and the IDF phases out of it as the LAF deploys, with the memorandum clause, sustained US persuasion, and a reconstruction unlock combining to move one position. This path is constrained by the locations contradiction and by Israel's demonstrated preference to hold captured ground.

Field collapse **LOWEST LIKELIHOOD**

The Washington table breaks, on a mass-casualty strike or a Rubio-Vance paralysis of the US lever, Tehran cites the Lebanon campaign to slow Buergenstock, and the venues revert to rhetoric while the line hardens into a frozen contested occupation. This path is held in check by the shared investment in the 60-day window.

IV. INDICATORS TO MONITOR

- A named southern pilot zone is agreed with a map and the IDF begins phasing out of it. Toward phased withdrawal, the LOWER path.
- The de-confliction cell publishes a charter, names its members, or holds a first working session. The announced instrument acquires substance, closing the load-bearing gap and resolving the Thread 2 ambiguity. Diagnostic on KJ-01.
- A Gulf capital or France attaches a named Lebanon commitment, a reconstruction deposit or a guarantor pledge, to its diplomacy. The field acquires an instrument it currently lacks.
- The Washington fifth round, or a sixth, yields a written declaration of intent that references a withdrawal. Diagnostic on the live table converting talk into text.
- Tehran refuses or postpones a Buergenstock session citing the Lebanon front. Toward field collapse, with Linchpin 1 breaking.
- Israel softens the no-withdrawal-even-on-an-American-demand line, or the United States publicly conditions something Israel needs on a Lebanon withdrawal. The US lever acquires teeth and KJ-05 shifts.
- The French post-UNIFIL force secures troop commitments, or a Security Council pathway opens, before the end-2026 UNIFIL mandate expiry. A credible post-withdrawal architecture forms.
- The reported Rubio-Vance cell split surfaces in an on-record US readout rather than in analysis only. Confirms the internal US constraint and validates the contested edge of KJ-05.



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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