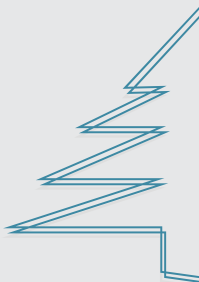


Assessment report

April 29, 2026

Lebanon on the Path to Direct Negotiations

**Context,
Trajectories,
and Risks**



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Lebanon and Israel are transitioning toward a new track of direct negotiations—the most extensive in decades—coinciding with the ceasefire between the United States and Iran. However, this shift should not be viewed as a sudden or isolated development. Rather, it is the outcome of a cumulative process that gradually took shape during Israel's expanded war on Lebanon, within which official Lebanese proposals aimed at ending hostilities were advanced. Yet, despite being framed as a gateway to a sustainable end to the war, this trajectory quickly generated broad domestic sensitivities and gave rise to sharp political and societal divisions. These tensions stem from fundamental questions relating to sovereignty, the monopoly on the use of force, the limits of the state's leverage in this process, as well as the potential implications of the negotiations and the impact of Israeli pressure on Lebanon's civil peace.

The Road to Negotiations

Following the signing of the US-French brokered ceasefire agreement between Lebanon and Israel, on November 26, 2024, and its entry into force the following day, the previous round of conflict concluded with a truce coupled with binding implementation commitments, rather than a mere political cessation of hostilities. The agreement stipulated the cessation of offensive operations, the deployment of the Lebanese Armed Forces in the south and at border crossings, and a phased Israeli withdrawal south of the Blue Line, in parallel with the implementation of UN Security Council Resolution 1701. Central to this arrangement was the establishment of the Cessation of Hostilities Monitoring Committee ("the Mechanism"), hosted by UNIFIL, chaired by the United States, and including France. The committee was tasked with monitoring compliance, verifying violations, receiving notifications of breaches from both parties, and developing procedures for consultation, inspection, and information gathering. It was also charged with coordinating the phased Israeli withdrawal and the deployment of the Lebanese Armed Forces, while working with the Lebanese Technical Military Committee to enhance the army's capacity to dismantle military infrastructure and seize unauthorized weapons.

As time progressed, Israel refused to implement the agreement, conditioning all steps on the complete disarmament of Hezbollah within Lebanon—a demand rejected by the party. Consequently, Israeli strikes and threats intensified. Amid this escalation, President Joseph Aoun appointed former Ambassador Simon Karam to head the Lebanese delegation to the "Mechanism" meetings. This step reflected a Lebanese attempt to contain the escalation by upgrading the level of representation within the Mechanism and opening a more flexible channel to address outstanding issues, without signaling an immediate transition to a comprehensive and direct political negotiation track. While this move did not yield tangible results, it nonetheless paved the way for a new form of "civilian" engagement between Lebanon and Israel, an approach that had been rejected for decades.

Throughout the conflict, the Lebanese state sought to distinguish its official position from Hezbollah's decision to open the "support front". It framed the war as a course of action imposed upon the country rather than one endorsed by its constitutional institutions. This position was clearly reflected in the Cabinet decision of March 2, 2026, which called for an immediate halt to Hezbollah's military and security activities, mandated its disarmament, and initiated a plan to confine weapons north of the Litani River, while signaling readiness to resume negotiations with civilian participation under international auspices. On the same day, Prime Minister Nawaf Salam emphasized that the launching of rockets and drones constituted a violation of the state's position, affirming that the government would not tolerate such operations or the dragging of the country into civil strife. In a related development, President Joseph Aoun proposed, on March 9, 2026, a four-point initiative to halt the escalation, structured as follows: First, establishing a comprehensive truce to end Israeli aggression against Lebanon; second, expediting the provision of logistical support to the Lebanese Armed Forces; third, enabling these forces to immediately assume control over recent conflict zones, confiscate all weapons therein,

and dismantle Hezbollah's military infrastructure and stockpiles, in accordance with available intelligence; and fourth, launching simultaneous direct negotiations between Lebanon and Israel under international sponsorship to implement these measures.

Although this proposal proved controversial domestically and represented an unprecedented shift in Lebanon's post-Taif Republic, Israel initially showed little interest, opting instead to expand its military operations and exert further political pressure. Only later did this trajectory return to the forefront, in conjunction with regional de-escalation between the United States and Iran.

The Launch of Direct Negotiations: Context and Background

The Israeli side did not engage with the Lebanese proposal for negotiations except in the context of shifting regional dynamics. On April 8, 2026, a ceasefire agreement between the United States and Iran was announced. Pakistani Prime Minister Shehbaz Sharif, acting as a principal mediator, presented this understanding as also encompassing a halt to the Israeli campaign in Lebanon, explicitly referring to Lebanon in a post on the X platform. Israel, however, swiftly rejected this interpretation. On the same day, the office of Israeli Prime Minister Benjamin Netanyahu stated that while Israel supported a two-week suspension of strikes on Iran, the ceasefire did not extend to Lebanon. Washington subsequently adopted this position. US President Donald Trump declared that Lebanon was excluded from the ceasefire agreement with Iran "because of Hezbollah," describing the situation in Lebanon as "a separate engagement." US Vice President J.D. Vance further clarified that the Iranians had assumed the understanding included Lebanon, "but it did not." This position was reiterated by White House Press Secretary Karoline Leavitt, who confirmed that Lebanon was not part of the arrangement.

On the ground, Israel translated this separation of tracks into a large-scale escalation. On April 8, Israel launched its most violent wave of airstrikes on Lebanon since the outbreak of the war, targeting Beirut and multiple regions across the country. According to official figures from the Lebanese Ministry of Public Health, the escalation resulted in over 357 fatalities, while the number of injured rose to 1,223.

It was within this specific context that the path to direct negotiations was launched—not as the outcome of comprehensive de-escalation, but as an alternative to it. On April 9, Netanyahu announced that he instructed the initiation of "peace talks as soon as possible" with Lebanon, specifying that these negotiations would focus on "the disarmament of Hezbollah and the establishment of peaceful relations between Israel and Lebanon." Through this strategy of escalation followed by a call for negotiations, Israel sought to consolidate the separation between the Lebanon and Islamabad tracks, subjecting it to an independent negotiating process centered on Hezbollah's disarmament. From the Israeli perspective, these negotiations appear as a political extension of the war, pursuing the same objectives. Netanyahu did not condition the negotiations on a cessation of hostilities; rather, Israel explicitly declared that it would not halt its military operations against Hezbollah, viewing the talks as a means to achieve disarmament and extract a broader agreement from Lebanon. This approach has been accompanied on the ground by efforts to impose new security realities in southern Lebanon, including the establishment, and potential legitimization, of a buffer zone. From this standpoint, negotiations are not conceived as a purely diplomatic track detached from the use of force, but rather as part of a broader process of reconfiguring the Lebanese security, political, and even social landscape. At its core lies a strategic objective of completely severing Lebanon from Iran, first through negotiations, and subsequently through a wider political process.

In contrast, the Lebanese state approached the issue from a different perspective. Beirut sought to prevent Iran from negotiating on its behalf and to avoid the Lebanese track remaining an adjunct to broader regional bargaining processes. Instead, it aimed to reassert its position as the sole sovereign authority entitled to negotiate

on behalf of Lebanon. Accordingly, the presidency and the government advocated a different sequencing: a ceasefire first, followed by direct negotiations under US auspices. This position was clearly reflected in statements by the Lebanese presidency, which called for a cessation of hostilities as a prelude to direct negotiations, as well as in an official Lebanese position conveyed to Reuters, which emphasized the need for "a separate track, but based on the same model" as the ceasefire arrangement between Washington and Tehran, with the United States acting as both mediator and guarantor. In this sense, the state's acceptance of the principle of direct negotiations did not mean alignment with the Israeli approach. Rather, it reflected an attempt to reclaim the Lebanese track from regional entanglements and restore it to the authority of the state.

This trajectory intersected with a sensitive internal development: a push to declare Beirut a weapons-free zone, invoking a concept used during the Lebanese Civil War in the 1980s. As Israeli strikes on the capital intensified, a domestic discourse gained traction, arguing that the restoration of sovereign decision-making begins with the state's monopoly on the use of force, not only in the south but also in the capital. This shift was reflected in official and political positions emphasizing the security of Beirut and the regulation of the arms within it. A group of Beirut Members of Parliament (MPs) announced a conference to declare the city a "demilitarized zone," while the Prime Minister discussed a gradual transition toward such a formula with parliamentary representatives from the capital. For its part, the government announced the immediate initiation of measures to strengthen state control over Beirut Governorate and to confine arms to the state. While the government framed this decision as a natural prerogative of any sovereign state-adopted through legitimate official channels aimed at neutralizing Beirut from the ongoing conflict-its opponents argued that it implicitly endorsed the Israeli narrative and provided a pretext for targeting the city on the grounds of the presence of arms.

Regarding domestic political positions, Hezbollah's stance was decisive in rejecting direct negotiations. Its Secretary-General, Sheikh Naim Qassem, called on Lebanese officials to "halt gratuitous concessions," affirming that the resistance would continue. Hezbollah MP Ali Fayyad likewise stated clearly that the party rejects this track, stressing that the Lebanese government must establish a ceasefire as a prerequisite for any subsequent steps, while also insisting on an Israeli withdrawal and the return of displaced persons.

Similarly, the Amal Movement and the political circle close to Speaker of Parliament Nabih Berri rejected any direct negotiations in the absence of a ceasefire. According to the National News Agency, Mustafa al-Fouani, head of Amal's Executive Bureau, emphasized that a ceasefire constitutes the fundamental prerequisite for any negotiations, and that "negotiating under fire" is both unacceptable and unjustified. He further stressed that the ceasefire monitoring mechanism established under the November 2024 agreement remains the practical executive framework that should be activated first.

Conversely, other Lebanese political forces-most notably the Lebanese Forces and factions supportive of the government-appeared more inclined to endorse the underlying approach of returning the portfolio to the state and prioritizing the issue of Hezbollah's weapons, though this did not necessarily imply a full alignment with the Israeli formula. Samir Geagea, leader of the Lebanese Forces, urged the government and the presidency to take bold decisions to restore state authority, effectively linking a resolution to Lebanon's crisis to the disarmament of Hezbollah and the restoration of the state's exclusive control over weapons. From this perspective, this camp viewed negotiations as an opportunity to reassert the authority of the state, rather than as a step toward normalization per se.

At the popular level, this trajectory triggered a clear division among the broader public. In Beirut, protests and sit-ins opposing direct negotiations emerged, with Hezbollah supporters participating and chanting slogans against the government and Prime Minister Nawaf Salam. These mobilizations framed negotiating under

bombardment as a form of political surrender and an attempt to marginalize the party and its social base within the Lebanese political order. Conversely, anti-government motorcycle rallies in the capital elicited a wave of sympathy for Prime Minister Salam, while simultaneously exacerbating sectarian tensions within the city.

Ultimately, the Lebanese state is seeking negotiations that would bring about a sustainable end to the war while consolidating its domestic legitimacy. Hezbollah, while not rejecting the principle of negotiations, objects to their modalities-particularly direct negotiations and their prominence in public debate-and refuses to concede under military pressure. Its position remains closely tied to the broader regional confrontation involving Iran. This divergence once again raises the risk of a security breakdown with a sectarian dimension within Lebanon.

Negotiation Tracks and Lebanese Pitfalls

In practice, the war in Lebanon did not come to an end, despite Iran's insistence that a ceasefire in Lebanon constituted a prerequisite for the launch of the Islamabad negotiations-a position articulated by the head of the Iranian negotiating team, Speaker of Parliament Mohammad Bagher Ghalibaf. At the same time, official Lebanese circles signaled their refusal to negotiate under fire. This condition, however, remained unmet. No comprehensive ceasefire was established on the Lebanese front; the attacks were largely confined to South Lebanon and the western Bekaa. Nevertheless, two negotiating tracks effectively emerged: the US-Iran track in Islamabad, and the Lebanon-Israel track under US auspices. The latter was initially facilitated through communication between the Lebanese ambassador to Washington, Nada Hamadeh Mouawad, and the Israeli ambassador to Washington, Yechiel Leiter, followed by two ambassadorial - the first held at the U.S. Department of State on April 14, 2026, and the second at the White House on April 23, 2026.

Israel succeeded in reordering the prioritization of a ceasefire in Lebanon among the relevant stakeholders. At a critical regional juncture, Iran has shown no inclination to obstruct the launch of negotiations, while the Lebanese government found itself lacking sufficient leverage, viewing withdrawal from the talks as tantamount to closing of the only available avenue.

The Lebanese and Hezbollah dossier will therefore remain on the agenda of the already faltering Islamabad negotiations, while proceeding in parallel within the Washington negotiation track.

However, Israel's insistence on Hezbollah's disarmament as a primary prerequisite for negotiations-combined with US alignment with this position and Israel's success in decoupling Lebanon from the regional ceasefire-places the country at a critical juncture. On the one hand, there is the risk of gravitating toward negotiations conducted under military pressure, which could extract significant sovereign and security concessions from the state. On the other, there is the risk of the collapse of this track, which would pave the way to renewed escalation and further attempts to impose new realities on the ground. Simultaneously, the confrontation is shifting inward, centering on the state's monopoly on the legitimate use of force, the nature of the negotiating process, the limits of the state's role, the mechanisms for defense and the restoration of territory and sovereignty, and the position of Hezbollah within the political system.

These issues remain deeply contested and carry the potential to entrench a political deadlock and trigger internal strife, particularly in the absence of any indication of Israeli willingness to offer substantive concessions. Furthermore, the sensitivity of these developments is further heightened when assessed in light of previous negotiation experiences, both regionally and in the context of the Lebanese-Israeli conflict. These experiences demonstrate that negotiations are inextricably linked to the balance of power. Israel often engages in such processes not as part of an abstract pursuit of settlement, but rather as a means of translating its military

superiority into long-term security and political arrangements. These historical precedents further demonstrate that negotiating under fire, or amidst a profound asymmetry in the balance of power, renders the weaker party more susceptible to concessions. Consequently, the negotiation process is transformed from a pathway to settlement into an instrument of managed coercion. In the Lebanese case specifically, past experience suggests that any negotiation lacking a unified internal reference framework, clearly defined national objectives, and robust implementation mechanisms and guarantees is liable to become a platform for the imposition of the Israeli agenda or the exacerbation of domestic divisions. Accordingly, Lebanon today faces more than a new round of negotiations, rather it confronts a composite test of its capacity to draw on past lessons, namely to prevent negotiations from becoming a political extension of the war, to ensure the issue of arms does not become a gateway to internal disorder, and to seek instead, where possible, to use the negotiation process as a means for ending the hostilities and restoring the state as the sole sovereign authority and ultimate guarantor of national security.