2027

STRATEGIC OUTLOOK · PREVIEW EXCERPT

LEVANT

Arrangements without settlement

Gaza, the West Bank and the Israel–Lebanon front enter 2027 held by conditional instruments, with mandates expiring and a government undecided



LOCATOR MAP · NATURAL EARTH · PLACES AT AREA LEVEL · BOUNDARIES ARE NOT AN ENDORSEMENT OF ANY CLAIM

DOCUMENT	VERSION	RESEARCH CUTOFF	PUBLISHED	JUDGMENTS	OVERALL CONFIDENCE
VO-2027-LV	1.0	15 November 2026	17 November 2026	6 · frozen	moderate

Preview excerpt. This file contains the cover, the executive assessment, the judgment table and the publication record of the full document. The complete publication adds the position entering 2027, the evidence and evaluation rule for each judgment, the alternative pathways, the cross-system implications, the monitoring framework and the full source register.

01 EXECUTIVE ASSESSMENT

Arrangements without settlement

CENTRAL JUDGMENT MODERATE

Vigil expects 2027 to be a year of managed non-settlement in the Levant. The conditional arrangements built in 2025 and 2026 persist, their expiry dates are met by renewal or lapse rather than by implementation, and Israeli forces still hold ground in Gaza and southern Lebanon when the year ends. Movement, where it comes, is more likely in presence — a committee, a contingent, a further pilot zone — than in the weapons and withdrawals that each instrument makes the other's condition.

The instruments, their dates and the absence of implementation are matters of record. The principal uncertainty is the policy of an Israeli government not yet formed at the cutoff, and how far the United States presses it.

The Levant enters 2027 as one system held in place by three arrangements, none of which is a settlement. In Gaza the ceasefire of October 2025 stands under Security Council resolution 2803, which authorises a Board of Peace and an International Stabilization Force until 31 December 2027[1,2,3]. On the Israel–Lebanon front a ceasefire in effect since 19 June 2026 sits beside a Trilateral Framework that sequences Israeli redeployment behind verified disarmament and sets no timeline[4,5]. In the West Bank the Oslo-era fiscal architecture is formally in force while its clearance revenue has been suspended completely since May 2025[6] ESTABLISHED.

At the cutoff none of these instruments had produced its central act. No weapon had been handed over in Gaza, the verification committee had not been constituted, the Palestinian administrative committee worked from Cairo and no force contingent was inside the Strip[7,8]. In Lebanon one pilot zone ran the Framework's sequence in July 2026 and none has since, and no verified transfer of Hezbollah's weapons to the state has been recorded[5,9]. Goods enter Gaza through one crossing[10] ESTABLISHED.

The largest open variable is Israeli. The election of 27 October left the outgoing prime minister's bloc with 53 of 120 seats, the main opposition bloc with 48 and Arab-led parties with 19[11]. On 8 November the President tasked Gadi Eisenkot with forming a government within 28 days, extendable by 14[12]; no coalition existed at the cutoff[13]. His stated positions — Hamas out of power within 18 months of his taking office, through the US framework or by force, and a Palestinian state called 'delusional' — point to a change of method more than of aims[14,15] VIGIL ASSESSMENT.

The year has a fixed calendar. Under resolution 2790 UNIFIL's mandate ends on 31 December 2026, with withdrawal within a year; no successor or postponement had been decided at the cutoff[16,17]. The Gaza mandate ends on 31 December 2027. Palestinian presidential and legislative elections were decreed for 11 September 2027, and on 15 November the PLO Executive Committee restated them as scheduled for 2027 without naming the day[2,18]. The United States and Israel are negotiating a successor to the ten-year assistance memorandum that expires in 2028, and on 3 November the US President said annual aid would stop[19,20].

Vigil expects the Security Council to extend the Gaza mandate rather than see it completed, and Israeli forces to remain in Lebanon beyond the five positions kept in 2025. It does not expect Israeli forces to withdraw from ground behind the original Gaza line, a UN force with formed military units to be operating in southern Lebanon at the end of 2027, or Palestinian national elections to be held in 2027. It considers it plausible that the Gaza transition bodies enter the Strip, because their entry costs neither party a weapon or a position. These are judgments about instruments and dates, not about the level of violence VIGIL ASSESSMENT.

Three developments would change this reading: an Israeli government accepting a phased sequence in Gaza or a border deal with Lebanon; Hezbollah fire after the UN force has gone; or the failure of the Palestinian Authority's payroll and banking link. The war with Iran, where nothing was agreed at the cutoff, remains the external shock most able to reach every front at once[21] CONDITIONAL.

PRINCIPAL DRIVERS

DRIVER 01

Conditionality in every arena

Access, money and withdrawal are each made to wait on disarmament or reform. Hamas offers weapons in step with withdrawal and Israel withdrawal after disarmament; the Lebanon Framework repeats the order. The arrangements suspend the conflict rather than resolve it[2,7].

DRIVER 02

An Israeli decision-maker not yet in place

Gaza sequencing, Lebanese redeployment and clearance transfers all fall to the government formed after 27 October. The candidate tasked on 8 November needs the ultra-Orthodox parties, Likud or outside Arab support to reach 61 seats[15,22].

DRIVER 03

A United States in three roles

Washington authored the Gaza plan, chairs the Board of Peace, facilitates the Lebanon Framework and supplies Israel, while moving to end grant assistance and refusing to prolong UNIFIL. Its willingness to spend leverage on implementation is what the dated, performance-based instruments assume and do not secure[2,23,20].

MOST CONSEQUENTIAL DEVELOPMENTS IN VIEW

A renewed Gaza mandate

Vigil expects the Council to extend the Board of Peace and stabilisation-force authorisation before 31 December 2027, with the terms of renewal the year's main diplomatic contest.

Transition bodies inside Gaza

Vigil considers it plausible that the administrative committee and a first force contingent enter the Strip by September 2027 — presence without disarmament or withdrawal.

A Lebanon front without a UN force

Vigil expects Israeli forces still inside Lebanon at the end of 2027 and no UN force with formed units operating there, leaving the parties' statements as the main record of the front.

PRINCIPAL UNCERTAINTIES

WHAT IS NOT KNOWN

- Whether a government forms from the 8 November mandate, and on which partners, was not known at the cutoff.
- The Lebanese army's phased arms plan is secret by cabinet decision, so transfers made without announcement would not be visible.
- What the Security Council decides on UNIFIL in December 2026, after the cutoff, sets how much of the Lebanon front can be independently observed.

CONFIDENCE — THE ANALYTICAL BASIS

HIGH MODERATE LOW

How well sourced and how contested the evidence is. High is the quietest mark by design.

EXPECTATION — THE OUTCOME

EXPECTED PLAUSIBLE NOT EXPECTED

Vigil's judgment for the stated horizon. Never a number.

EVIDENCE STATUS

ESTABLISHED ATTRIBUTED VIGIL ASSESSMENT UNRESOLVED CONDITIONAL

What kind of statement a sentence is. The louder the mark, the less is claimed.

02 FINAL JUDGMENT TABLE

The 2027 judgments at a glance

ID	JUDGMENT	EXPECTATION · HORIZON	BASIS	SUPPORTED IF
VO27-LV-01	Vigil expects the UN Security Council to adopt, on or before 31 December 2027, a resolution extending the authorisation of the Board of Peace and the International Stabilization Force beyond that date.	EXPECTED By 31 December 2027	MODERATE	By 31 December 2027 the Council has adopted a resolution extending beyond that date the authorisation of both the Board of Peace and the stabilisation force (or of renamed successors to either), for more than three months.
VO27-LV-02	Vigil does not expect Israeli forces to withdraw, by 31 December 2027, from ground on the Israeli-held side of the Yellow Line as it was drawn in October 2025; any pullback in 2027 is more likely to return ground taken since.	NOT EXPECTED By 31 December 2027	MODERATE	By 31 December 2027 neither Israel, the UN nor the Board of Peace has recorded an Israeli withdrawal from any ground on the Israeli-held side of the October 2025 Yellow Line. Pullbacks from ground taken after October 2025 do not count against the judgment.
VO27-LV-03	Vigil considers it plausible that the National Committee for the Administration of Gaza is working from premises inside the Strip, and that at least one International Stabilization Force contingent has entered it, by 30 September 2027.	PLAUSIBLE By 30 September 2027	LOW	By 30 September 2027 the committee, the Board, the UN or a contributing state has announced both (a) committee officials working from premises inside Gaza and (b) troops or police of the stabilisation force inside the Strip. A signed participation agreement, a visit or a liaison team does not count.
VO27-LV-04	Vigil expects Israeli forces to still hold ground inside Lebanese territory on 31 December 2027, beyond the five positions they kept in February 2025.	EXPECTED On 31 December 2027	MODERATE	Israeli, Lebanese or UN statements or reports dated in the final quarter of 2027 show Israeli forces holding ground inside Lebanon beyond the five positions kept in February 2025, and no complete withdrawal has been announced by 31 December 2027.
VO27-LV-05	Vigil does not expect formed military units under UN command to be operating in southern Lebanon with a Security Council mandate on 31 December 2027, whether as UNIFIL under a postponed drawdown or as a successor force.	NOT EXPECTED On 31 December 2027	MODERATE	On 31 December 2027 no formed military unit under UN command is operating in southern Lebanon under a Security Council mandate. Individual UN military observers, a liaison or political presence, and UNIFIL elements engaged only in withdrawal or liquidation do not count against the judgment.
VO27-LV-06	Vigil does not expect Palestinian presidential and legislative elections to be held across the West Bank, East Jerusalem and the Gaza Strip on 11 September 2027, the decreed date, or on any other date in 2027.	NOT EXPECTED By 31 December 2027	MODERATE	By 31 December 2027 polling has taken place in neither a presidential nor a legislative election.

03 PUBLICATION RECORD

Edition, version and forecast-freeze status

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FORECAST REGISTER	https://vigilconsilium.com/assessments/2027/register/
CORRECTIONS	None recorded. A correction is dated and added here and in the register; the original text of a judgment is never replaced.
REVIEWS	Quarterly evidence reviews during 2027 and a final evaluation after each horizon closes are published in the register, separately from the frozen text.
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