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READER EDITION

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ISRAEL BRIEF

Friday, November 7

Israel moves from deterrence to coercion up north while the “day-after” in Gaza is rebuilt on old foundations; partners realign even as Israel’s legal armor is tested at home.

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THE BOTTOM LINE Europe’s gas math and Asia’s defense math both favor Israel. If EastMed advances with U.S. support, Jerusalem gains a strategic export artery that hardens EU political cover while undercutting Moscow and dodging Yemen’s leverage; keep IMEC link-ups close and the corridor becomes a multi-modal spine, not just a pipe. In the Pacific, the Philippines offers a the template: even when politics demand a headline, militaries keep Israeli platforms alive through training, MRO, and corporate plumbing. Expect more “bans” that bend into service contracts and affiliate deals. The risk is complacency—Israel must lock long-term service, spares, and co-production to make these lanes sticky when the news cycle turns.

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Reader Edition

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In the north, Israel is striking to keep Hezbollah weak and signaling the end of “proportionality,” as evacuation maps go live and Western intelligence now warns the group is *running out of patience* under base pressure to act. Jerusalem is readying for “days of battle” if restraint cracks, while Washington quietly preps allies.

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In Gaza, Netanyahu and Dermer are negotiating a memorandum with Washington to secure full freedom of action as Defense Minister Katz orders the total eradication of Hamas's tunnel network—"If there are no tunnels, there is no Hamas." The West's new stabilization force and UNRWA's return risk re cementing the failed order even as the IDF demobilizes reserves and fortifies the frontier.

In Judea and Samaria, nightly raids keep the networks off balance, but the long game remains political—Israel must declare sovereignty, not just manage the mess, or others will.

At home, the draft fight splinters Shas, while inside the IDF, Lt. Gen. Zamir's interim reshuffle puts Maj. Gen. Dado Bar Kalifa over the Military Advocate General's corps until Itay Ofir's appointment clears—an effort to steady the legal front after the Sde Teiman implosion.

Abroad, normalization lanes reopen, EastMed energy routes return to the table, Kazakhstan joins the Abraham Accords, and the money men feeding Hezbollah feel the squeeze.

Flash Brief

- **South Lebanon:** IDF hits Radwan depots and a "Construction Unit" near Tyre after mapped evacuations in Tayr Debba, Ayta al-Jabal and follow-on towns. *See The War Today.*
 - **Doctrine shift:** Jerusalem signals any fire on Israeli soil will trigger large punitive responses on Hezbollah and Lebanese assets. *See Developments to Watch.*
 - **Hezbollah window:** Internal pressure mounts for a visible reply; IDF stays on high alert as strike cadence rises. *See Developments to Watch.*
 - **Gaza:** U.S. circulates a two-year ISF plan as UNRWA restarts Jew-hate classes; Egypt floats "safe passage" for trapped Hamas men—Israel says no. *See The War Today.*
 - **Reserves down, border up:** IDF demobilizes thousands while moving to "enhanced border security" and continued tunnel demolition. *See Developments to Watch.*
 - **Inside Israel:** Shas fractures over the draft bill; Sde Teiman probe deepens as the AG recuses and a temporary MAG is tapped. *See Inside Israel.*
 - **Realignments:** Singapore tightens ties, Saudi talks prime for launch, Kazakhstan joins the Accords; EastMed gas corridor returns to the agenda. *See Israel and the World.*
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The War Today

Hezbollah Defies Disarmament as Israel Escalates Campaign

The Israel Defense Forces launched a coordinated series of strikes across southern Lebanon on Thursday, hitting Hezbollah's "Construction Unit" near

Tyre and multiple Radwan Force weapons depots embedded inside civilian areas. Evacuation alerts went out to residents in Tayr Debba, Ayta al-Jabal, and nearby villages before precision munitions hit the targets—part of an intensified push to dismantle Hezbollah’s rebuilt infrastructure in defiance of last year’s ceasefire. Northern Command chief Maj. Gen. Rafi Milo told local leaders the mission is to “strike and destroy to keep Hezbollah weak.” Hours later, Hezbollah fired back politically: in an open letter to Lebanon’s president, prime minister, and parliament speaker, the group reaffirmed its “legitimate right to resist occupation and aggression,” rejected all negotiations with Israel, and pledged to defend its arms as “a pillar of national sovereignty.” Lebanese President Joseph Aoun condemned the Israeli operations, while UNIFIL accused Israel of “clear violations.” Meanwhile, Washington imposed new sanctions on money-exchange networks that funneled over \$1 billion from Iran’s Quds Force to Hezbollah, signaling a parallel economic offensive as Israel turns up military pressure.

ASSESSMENT

Jerusalem’s strikes are no longer symbolic deterrence—they are deliberate coercion aimed at forcing Beirut’s hand on Hezbollah’s disarmament. Hezbollah’s defiant rhetoric and appeal to “sovereignty” mask internal strain: cash pipelines are choking, the Lebanese army is under Western scrutiny, and local civilians are evacuating in waves. Israel’s “weakening round” doctrine—short, high-intensity bursts to pre-empt rearmament—marks a shift from reaction to regimen. The next inflection point will be whether Hezbollah answers with rockets or restraint. Either choice will expose how much control Tehran still holds over its most valuable proxy—and how much longer Lebanon can pretend that “resistance” is just that.

Gaza’s Next Experiment as UNRWA Returns and Hamas Rebrands

As Israel winds down major combat and Washington corrals allies behind a postwar plan, Gaza’s old infrastructure—schools, agencies, militias—has quietly reassembled itself under new banners. The United States has formally circulated a draft UN Security Council resolution to authorize a two-year “International Stabilization Force” (ISF) of roughly 20,000 troops and a transitional Palestinian governance board empowered to *disarm Hamas* and secure borders with Israel and Egypt. Arab partners—Egypt, Qatar, Saudi Arabia, the UAE, and even Turkey—have endorsed the framework, though Jerusalem insists on veto rights over troop composition and seeks a written agreement from Washington guaranteeing Israel’s freedom of action if the force fails. Egypt, meanwhile, has floated a separate deal: Hamas fighters still trapped in Rafah may surrender their weapons and tunnel maps to Cairo in exchange for safe passage to areas still under Hamas control. Israel has not agreed. In parallel, UNRWA—banned by Israel for its Hamas ties—has resumed classes for 30,000 children in tents and rubble, again using Palestinian Authority textbooks long condemned for antisemitic and militant content. At the same time, some 40,000 Gazans have left the Strip since the ceasefire, most paying bribes or seeking fake medical papers to flee. The IDF, for its part, is demobilizing thousands of reservists (though it scaled back the demobilization

in Judea and Samaria, due to terror concerns) and shifting to an “enhanced border security” posture—tanks parked, sensors on, nerves taut.

ASSESSMENT

The West is rebuilding Gaza on the same foundations that collapsed before. UNRWA’s tent revival (pun intended), a foreign peacekeeping force with Turkish and Qatari fingerprints, and Egyptian amnesty offers to armed men all point to a familiar cycle. Israel’s instinct to demand written U.S. guarantees is correct: once a UN mandate is in force, military freedom narrows. The risk is strategic capture—foreign troops shielding Hamas remnants, UNRWA indoctrinating the next generation, and Arab mediators trading control for calm. The opportunity is limited but real: insist that any international presence report directly to Israel-U.S. command channels, block UNRWA (and their hideous curriculum), and keep Gaza’s exit door open for those who wish to leave rather than fight. Israel’s task is to prevent the same agencies that fueled the last generation of jihad from educating the next.

Inside Israel

Conscription Fight Hardens: Shas Splits, Streets Mobilize, Polls Shift

Israel’s ultra-Orthodox draft crisis has now fractured its key political pillar: Shas, the Sephardi Haredi party long seen as a coalition linchpin between faith and governance. Party leader Aryeh Deri has endorsed a softened conscription bill that would preserve exemptions for full-time yeshiva students while imposing minimal service targets—a move meant to keep the coalition alive. But leaked recordings show the party’s senior rabbis accusing him of sidelining them and diluting religious control over policy. Deri wants a deal to keep Haredi voters safe from arrest; the clerical camp insists no Torah student should ever serve. At the same time, hardline sects outside Shas—the Eida Haharedit and Jerusalem Faction—flooded Jerusalem’s streets, blocking major roads and calling the draft “a decree of persecution.” In the background, a new poll gives Likud a slight bump but leaves no political cushion for compromise.

ASSESSMENT

The coalition lacks a political cushion for risk. Shas’s inner split means even a watered-down “evasion law” can wobble in committee, and the Eida Haharedit’s escalatory play raises the price. Even if a compromise passes, it will fail without two hard deliverables: a universal, enforceable core curriculum tied to funding (math, science, Hebrew/English) and credible service lanes that the IDF actually needs—combat support, cyber, medical, home-front, and civilian national service scaled to real vacancies. The IDF’s ask—12,000 people—won’t be met by slogans, and the treasury won’t sustain a first-world economy on a third-world skills base. The window is now: codify core studies for all state-funded schools, phase penalties and benefits to outcomes (not promises), lock service targets annually to published IDF manpower plans, and build a cross-bloc pact to keep it in force past the next election. If the politicians choose optics again—symbolic quotas, frozen enforcement, stipends without standards—the country will get what it pays for: fewer soldiers, slower growth, and a larger, angrier street.

Sde Teiman Fallout Deepens

Israel's most damaging legal scandal in decades widened again as Attorney General Gali Baharav-Miara formally recused herself from the Sde Teiman leak investigation amid a mounting conflict-of-interest fight, police confirmed the recovery of former IDF Military Advocate General Yifat Tomer-Yerushalmi's phone from the Tel Aviv surf, and the army moved to stabilize its legal corps by appointing Maj. Gen. Dado Bar Kalifa—head of the Manpower Directorate—as temporary MAG. Justice Ministry legal adviser Yael Kotik ruled that Baharav-Miara may need to testify about her own oversight of the original probe and must therefore hand the case to State Attorney Amit Aisman. Justice Minister Yariv Levin rejected that solution, naming retired judge Asher Kula as independent monitor until the High Court decides who controls the probe. In parallel, police raided the MAG offices under court warrant, as tensions erupted inside law enforcement between Lahav 433 and the Investigations and Intelligence Division over who leads the inquiry. Late Friday, the phone that Tomer-Yerushalmi allegedly threw into the sea was recovered—unlocked, partially charged, and verified as hers—confirming evidence destruction efforts even as she begins ten days of house arrest.

ASSESSMENT

This case has become a full-spectrum test of Israel's rule of law under fire: a military prosecutor caught leaking, an attorney general under suspicion of cover-up, a justice minister asserting emergency authority, and a police command split over who can be trusted to investigate whom. By assigning Bar Kalifa to steady the MAG Corps, the IDF signaled it values continuity over optics—he will command administratively while professionals handle prosecutions until the High Court clarifies oversight. The repair plan is obvious and painful: isolate the investigation from political hands, publish its findings in full, and rebuild the legal corps under external review. Anything less leaves Israel's moral armor cracked just when it needs it most.

Israel and the World

Accords Reignite while Quiet Ties Deepen

Singapore's foreign minister met the prime minister and Israel's new foreign minister in Jerusalem, praising a "special, unique" relationship that now spans defense, tech, and a shared read of the region. In Washington, the U.S. is lining up an announcement to launch Israel-Saudi direct talks during MBS's visit, with normalization expected to begin on economics and trade while hashing out the harder issues—Saudi civil-nuclear terms, Gaza's day-after role for (vetted) Palestinians, and U.S. kit such as F-35s. The Abraham Accords got a visible jolt as Kazakhstan formally joined, signaling a Central Asian bridge that pairs oil, uranium, and overflight value with open ties to Jerusalem. In the United States, the Ohio House voted 73–10 to create an Ohio-Israel Trade and Innovation Partnership aimed at pulling Israeli agtech, aerospace, cyber, and medical firms into the state. And with the ceasefire holding, Israel returned to London's World Travel Market to revive inbound

travel, as the Tourism Ministry leans into Jewish and Evangelical markets to seed first movers.

Why It Matters: The diplomatic lane is moving again. A Saudi economic-first track gives Jerusalem and Washington a way to bank progress while grinding through the nuclear and Gaza sticking points; Kazakhstan's entry widens Israel's inroads into Central Asia; Singapore stays a durable Pacific anchor; and U.S. state-level deals keep American ballast under Israel's economy while federal politics churn. Tourism returning from the UK converts image into income. Net effect: Israel's partners are choosing utility over theater—and that accrues deterrence and markets Israel will need if the northern front heats up.

Energy and Arms Lanes Rewire Around Israel

Energy ministers from Israel, Greece, Cyprus, and the U.S. put the EastMed gas corridor back on the table—with Washington now willing to shoulder a “major role”—to move Israeli gas through Cyprus and Greece into Europe, bypassing both Russia and Houthi-threatened routes and pointedly excluding Turkey. In Asia, Manila's “ban” on new Israeli arms orders is mostly signage: Philippine forces still rely on Elbit for tiered UAV fleets, training, and sustainment, and are routing fresh buys through Elbit subsidiaries (a \$41m sonar package via GeoSpectrum) to keep capability flowing. The alignment is the same in both arenas: customers want Israeli tech that works, and partners want energy that moves without Iranian or Russian vetoes.

ASSESSMENT

Europe's gas math and Asia's defense math both favor Israel. If EastMed advances with U.S. support, Jerusalem gains a strategic export artery that hardens EU political cover while undercutting Moscow and dodging Yemen's leverage; keep IMEC link-ups close and the corridor becomes a multi-modal spine, not just a pipe. In the Pacific, the Philippines offers a the template: even when politics demand a headline, militaries keep Israeli platforms alive through training, MRO, and corporate plumbing. Expect more “bans” that bend into service contracts and affiliate deals. The risk is complacency—Israel must lock long-term service, spares, and co-production to make these lanes sticky when the news cycle turns.

Briefly Noted

Diplomacy & Geopolitics

- **Sen. Elizabeth Warren** pressed a U.S. defense nominee to back an Israel– Hamas ceasefire and the U.S.-run Gaza Humanitarian Foundation—accusing Pentagon “indifference” of costing Palestinian lives—while he stressed the need to prevent Hamas looting and declined to grade the program.
- **Pope Leo XIV** met Mahmoud Abbas and urged more aid into Gaza alongside a two-state endgame under the post-truce diplomacy the Holy See has been pushing; the Vatican is signaling preference for a PA-led “day after,” not Hamas (though there is no tangible difference between them).

- **Washington** is preparing a military foothold at a Damascus air base to help monitor a U.S.-brokered Israel–Syria non-aggression deal and a southern DMZ—a marker of Syria’s post-Assad tilt and of America’s intent to police any pact.
- **The Hague Appeals Court** threw out NGO demands to freeze Dutch defense exports and trade with Israel, saying such policy calls rest with government—even as it noted earlier limits on F-35 parts transfers.
- **A Qatari government office** allegedly hired a U.K. firm to dig up dirt on the woman accusing ICC chief prosecutor Karim Khan of sexual abuse—and to tie her to Israel—while he faces a U.N. probe and retaliation claims.

Domestic & Law

- **Three young Israelis** died in a week after suspected synthetic-drug use, prompting police probes and warnings about lethal “Dosa”-style chemicals flooding app-based markets as post-Oct. 7 trauma fuels demand; officers want tighter laws and enforcement.

Culture, Religion & Society

- **Protesters** lit a flare and set seats ablaze inside Paris’s Philharmonie during the Israel Philharmonic’s concert; the musicians finished Beethoven and earned a standing ovation while police cleared the hall.
- **Dutch Christian leaders** rallied outside Amsterdam’s Royal Concert Hall after it nixed a Chanukah show over an IDF cantor, as France’s culture minister publicly welcomed the Israel Philharmonic and condemned boycott calls.
- **A North Carolina man** was convicted of a federal hate crime for mailing Holocaust-taunting postcards to a Georgia rabbi and state lawmaker, a verdict carrying more than five years in prison.
- **BBC Arabic** showcased a PFLP bomber’s new novel titled “The Holocaust Custodian” without noting he helped murder Holocaust survivor Leah Levine—broadcast judgement so poor it reads like satire until you recall the body count.
- **Paramount Skydance** is reportedly blacklisting “overtly antisemitic” talent and rebuffing Israel-boycott calls—an unusual case of corporate courage.
- **West Midlands Police** deployed 700 officers and barred Maccabi Tel Aviv supporters from the Aston Villa match amid rival protests, a decision slammed by Britain’s prime minister and a recently freed Israeli hostage.
- **A leaked review** says BBC Arabic “raced to air” anti-Israel claims and minimized Israeli suffering, even as a senior BBC news executive lauded it as “exceptional” and “almost as trusted as Al Jazeera,” deepening calls for accountability.

Developments to Watch

Northern Front (Lebanon / Syria)

- **Evacuation Maps Go Live** – IDF issued mapped evacuation warnings for Tayr Debba, Taybeh and Aita al-Jabal ahead of precision strikes on Radwan and “Construction Unit” sites; follow-on alerts hit Zawtar al-Sharqiyah and Kfar Dounine within hours. **LIKELY TO ESCALATE**
- **End of ‘Symmetry’ Doctrine** – Jerusalem signaled that even minor fire on Israeli soil will now trigger a large, punitive response on Hezbollah and Lebanese state assets, not proportional tit-for-tat. **LIKELY TO ESCALATE**
- **Hezbollah Retaliation Window** – Ahead of a speech by Naim Qassem, internal pressure from fighters’ families is mounting for a visible reply to IDF strikes; watch for a rocket or drone attempt within 24–72 hours. **LIKELY TO ESCALATE**
- **U.S. Briefs Allies on Escalation** – Washington privately told regional and European capitals to expect intensified Israeli operations in Lebanon as Israel’s cabinet meets to lock a northern campaign framework. **LIKELY TO ESCALATE**
- **Strike Cadence Rises** – Fresh footage from Kfar Dounine shows precision hits on Hezbollah sites; IDF remains on high alert while planners say ~4 weeks are needed to reach full readiness for a broader operation—raising interim miscalculation risk. **LIKELY TO ESCALATE**

Gaza & Southern Theater

- **Reserve Drawdown, Border Up** – The IDF is demobilizing thousands of reservists while shifting Gaza to an “enhanced border security” phase—ISR density increases, rapid-reaction armor parked forward, and tunnel demolition teams stay active.

Regional Axis (Iran, Houthis, Militias)

- **Quds–Hezbollah Cash Squeeze** – New U.S. Treasury sanctions target ex-changers moving >\$1B from the IRGC Quds Force to Hezbollah this year; expect rerouting via Syrian and Iraqi nodes and short-term liquidity stress for Radwan logistics.
- **Houthis Hint ‘Joint Front’** – Yemeni proxies signaled Iranian-approved retaliation if Israel expands Lebanon ops, linking Red Sea launch options to Hezbollah’s cadence. **LIKELY TO ESCALATE**
- **IAEA Patience Wearing Thin** – Rafael Grossi warned Tehran to cooperate on nuclear monitoring or face renewed confrontation; any further stonewalling compresses Western decision time and Israeli contingency clocks. **LIKELY TO ESCALATE**

Judea & Samaria

- **Preemptive Night Grabs** – Shin Bet-IDF teams quietly detained an imminent attacker in Nablus's Askar quarter and later eliminated two Molotov-throwers near Jdeira; expect more pinpoint arrests to blunt holiday-season cells. **LIKELY TO ESCALATE**

Diplomatic & Legal

- **Damascus Airbase Track** – U.S. preparations continue to stand up a presence at a Damascus-area airbase to monitor a prospective Israel-Syria non-aggression deal and southern DMZ; Syrian denials aside, runway checks and logistics scoping are underway. **LIKELY TO ESCALATE**
- **Austria Rolls Up Cache** – Vienna police seized a weapons stash intended for attacks on Jewish/Israeli sites in Europe, reinforcing the elevated threat to diaspora institutions as Lebanon tensions tick upward.

We are past symbolism. The north is now a deliberate coercion campaign designed to force Beirut to act or accept consequences, with U.S. economic pressure tightening Hezbollah's cash lines in parallel. In Gaza, "stabilization" risks becoming another shield for Hamas remnants unless the mandate's teeth are owned in the only place that matters—operationally. At home, the draft bill and the Sde Teiman investigation determine whether Israel can both fight and stay itself.

If Hezbollah chooses rockets over restraint, expect a fast, heavy Israeli answer and more evacuation orders. If it blinks, Israel will keep shaving logistics and cash until the pain registers in Beirut, not just Dahiyeh. In Gaza, the ISF text and UNRWA footprint confirm we are just recycling failure. Inside Israel, the draft law must deliver bodies and core studies tied to funding.

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Mitzpe Institute is an intelligence and strategy organization focused on Israeli security, diaspora threat assessment, and the strategic challenges confronting the Jewish people and the West. We produce daily intelligence, forensic analyses, strategic assessments, and tactical briefings read by policymakers, military leaders, and institutional decision-makers across more than 90 countries and all 50 US states — from the Knesset and the US Congress to allied governments, major policy institutions, and Jewish organizational leadership worldwide.

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