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READER EDITION

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ISRAEL BRIEF

Monday, December 8

Phase II gets softer language, harder facts, and a new border line in Gaza's powdery sand.

◇ URIEL ZEHAVI

THE BOTTOM LINE Israel is fighting a multi-front war in which the West remains nominally an ally and, more realistically, a liability. Turkey hosts Hamas's money men. Qatar hosts its leadership. Western universities host its foot soldiers. Western diplomats host its narratives. The good news is that Israel has finally stopped pretending otherwise. The exposure of Iran's Turkish laundering network, combined with growing Western intolerance for open antisemitism, is shifting the Overton window: this isn't a "conflict," it's a global proxy campaign. Israel's job is to treat every arena — Istanbul, Toronto, London, Brussels, Doha — as part of the operational map. And it is starting to.

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HAMAS is suddenly talking about “storing” its weapons and “searching for bodies” while Qatar and Turkey try to rewrite Phase II so that disarmament moves from first on the list to never. On the ground, the IDF is doing the real work. Zamir calls the Yellow Line a new border, another tunnel under Rafah is gone, and a Hezbollah tunnel in the south Lebanon grid has been fully dismantled. In Judea and Samaria, a two-week campaign just ripped up more of Iran’s corridor while the state signs a budget that quietly cements a long-war army and a much deeper Jewish footprint east of the Green Line. Abroad, Doha runs Islamist theater, Lufthansa freezes arms cargo, Western streets keep getting less safe for Jews, and Israel’s ambassador to Washington tells the Lebanese people plainly: choose peace and disarm Hezbollah or stay chained to Tehran.

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A quick glance at the day before we dig in:

Flash Brief

- **Gaza:** Hamas floats “freezing” weapons as Qatar, Turkey and Egypt push withdrawal while IDF enforces the Yellow Line, killing another infiltrator.
- **Hostages:** Ran Gvili still held in Gaza; Israel repeats there is no Phase II while his body lies underground.
- **North:** IDF destroys another Hezbollah tunnel and depot, UNIFIL shrugs, and a quiet ultimatum on disarmament north of the Litani surfaces.
- **Mediators:** Egypt, Qatar and eight Arab states issue a joint declaration to lock in their version of Phase II before Trump–Netanyahu meet; Washington dangles a Netanyahu–Sisi summit for a gas deal.
- **Inside Israel:** Cabinet passes a security-heavy 2026 budget and a 2.7b Judea–Samaria buildout as draft law fights collide with 22,000 new wounded and a rehab system racing toward 100,000.
- **Info-war & lawfare:** Lufthansa Cargo halts weapons shipments to Israel, Hamas’s Iran-run money network in Turkey is exposed, and Western antisemitism runs from Toronto Ubers to British campuses.
- **Alignment:** Israel’s envoy calls on Lebanon to disarm Hezbollah and join an Abraham Accords 2.0 horizon while Qatar says it won’t pay to rebuild Gaza alone.

Opening Analysis

In Gaza, Hamas and its sponsors are trying to turn a hard 20-point document into soft-focus talking points about “stability,” “unity,” and “stored” weapons, while leaving every actual gun in the same hands. They tell you the truth if only you have ears to listen. Israel is answering with concrete and fire: Yellow Line as forward border, tunnels razed, infiltrators shot the second they cross with ill intent.

In the north, the gap between rhetoric and reality is just as wide: Lebanon tells the world it will disarm Hezbollah, its foreign minister admits openly that only Iran can do that, and UNIFIL says it doesn’t bother checking buildings (quelle surprise). The IDF, seemingly the only adults in the equation, quietly pulls obsolete Hezbollah infrastructure out by the roots.

Inside the country, the budget and draft debates are really about the same question — will Israel live according to the war it is in, or by the illusions that got us here.

Let’s walk the fronts in order.

The War Today

Hamas Softens Rhetoric, Hardens Reality in the Lead-Up to Phase II

Hamas's political shop is suddenly speaking in silk gloves — with Khalil al-Hayya promising to “enter new areas to search for bodies” and Bassem Naim offering to “freeze or store” weapons — but the underlying line hasn't moved an inch: disarmament is off the table, resistance is sacred, and any international force is welcome only if it never needs arms nor sets foot where Hamas rules. Jihadist Qatar and terror-supporting Turkey are executing the same play from a different angle, pressing Washington to replace disarmament with decommissioning, storage, or transfer to the PA — all designed to preserve Hamas's veto over Gaza and deny Israel a decisive win. Add Egypt's push for rapid Israeli withdrawal and its insistence that a foreign force “keep peace, not impose it,” and Phase II is being remodeled into a plan where Hamas remains armed behind a glass door. Israel, meanwhile, is treating the Yellow Line as a permanent border, enforcing against infiltrators with lethal force, dismantling fresh tunnels, and telling every mediator the same thing: without Ran Gvili's return and Hamas's actual disarmament, nothing moves. Netanyahu spelled it out — “the force can do some tasks, but not the main ones” — and Zamir backed it with territory, calling the Yellow Line Israel's new defensive boundary.

ASSESSMENT

Hamas is attempting to turn Trump's 20-point plan into Oslo with better lighting — symbolic gestures up front, weapons in the basement, and foreign forces on the hook for a ceasefire Hamas clearly has no intention of honoring. The “freeze our weapons” line is a stall tactic designed to drag Israel into Phase II while the tunnels regroup. Hamas leaders are more than willing to admit, publicly, that they won't disarm. Sadly, Western diplomats seem disinclined to believe them. Fortunately, Israel sees the game and is locking in facts: tunnel demolition, border enforcement, and a hostage-body veto that blocks all of this atrocious choreography. The inflection is simple: if mediators insist on a Phase II that preserves Hamas's guns or its leverage, Israel will run its own version — alone, at the time of its choosing — that leaves no space for Hamas to re-entrench.

Lebanon's Ceasefire Cracks While Iran Holds the Only Key

Israel has continued to deepen its shaping operations along the northern arc, demolishing another Hezbollah tunnel and weapons depot in southern Lebanon — part of the same grid that fired mortars toward Israel earlier in the war — while expanding ISR density and conducting drone drills as the year-end ultimatum approaches. Lebanese officials admitted the foreign minister admitted Hezbollah cannot disarm without Iran's permission, and UNIFIL's commander claimed Israel is the violator while insisting his mission “does not inspect private buildings,” effectively conceding the entire southern sector to Hezbollah's discretion. On the ground, a leaked Lebanese report notes an ultimatum expiring early next year unless Tehran orders disarmament north of the Litani. Residents in Metula see the writing more clearly than

diplomats — burned homes, half-empty streets, and an economy built on hope and apple orchards that can't survive another round. Meanwhile, Washington is still warning Iraqi militias that joining forces with Hezbollah will bring Israeli strikes into Iraq, compressing the entire northern theater into one Iranian decision point.

ASSESSMENT

Neither Hezbollah nor Lebanon control the clock, at the moment Tehran does — though Israel is capable of stepping in to reset the clock to another time zone. Lebanon's government is a spectator, UNIFIL is a bystander, and Hezbollah's silence is frequently misread as restraint when it is simply waiting for instructions. The north has moved from "shaky ceasefire" to pre-war preparations. The only question left is who chooses the hour.

Egypt, Qatar, and Turkey Try to Pre-edit Phase II Before Trump and Netanyahu Meet

Egypt, Qatar, and a coalition of eight Arab and Islamic states coordinated a joint declaration aimed at blocking any U.S.-Israel reinterpretation of Phase II ahead of Netanyahu's trip to Florida. Their concern is explicit: Israel's one-way opening of Rafah, refusal to withdraw fully, and insistence on disarmament and hostage-body sequencing are "violations" of understandings Cairo and Doha claim to own. Qatar's prime minister went further, claiming its relationship with Hamas was originally "requested by the U.S." and its funding was merely "aid facilitated by Israel," a narrative cleanse ahead of Phase II. At the same time, Turkey and Qatar are lobbying to rescue Hamas from disarmament entirely, offering alternative "storage" plans that would preserve Hamas as Gaza's shadow authority. Washington is still trying to convene Netanyahu and al-Sisi — with side demands like approving a gas deal — while preparing broader energy and technology incentives for Arab states. But the U.S. is split between Israel's clarity and Turkey/Qatar's hedging. State Department spokespeople insist Hamas must honor the 20-point deal it signed; Hamas leaders are rejecting its core terms on camera.

ASSESSMENT

The mediators have become the spoilers. Egypt and Qatar are moving to trap Israel inside a Phase II that rescues Hamas politically while boxing in Israeli military freedom. Turkey wants a seat at the table to shape Gaza into Ankara's ideological outpost. And Washington is trying to broker diplomacy without confronting the simple fact: every Arab "concern" aims at one outcome — preventing Hamas's decisive defeat. Israel sees the alignment clearly. Phase II will either reflect Israeli red lines — disarmament, hostage-body resolution, and Israeli control of security — or it collapses. There is no middle path that survives contact with reality — it's literally a war for the West. Unfortunately, asinine leaders prefer to deposit Doha's dollars rather than hold them to account. Time will tell who continues to pay the price.

Inside Israel

Security-First Budget and a Quiet Judea–Samaria Revolution

The cabinet pushed through a NIS 662 billion 2026 budget anchored by a NIS 112b defense envelope, a three-year NIS 725m security package for Judea, Samaria, and the Jordan Valley, and billions more for police, prisons, and internal security — all while coalition arithmetic in the Knesset remains shaky thanks to Haredi threats to torpedo the budget over the draft bill. The same framework bakes in Smotrich's 2.7b plan to harden life “beyond the Green Line.” Moving divisional HQs and battalion bases into northern Samaria, funding 17 new communities and dozens of outposts, setting up a dedicated land registry for Judea and Samaria, and pouring money into roads, armored buses, and council budgets — a de facto annexation that future governments will struggle to reverse even if they wanted to.

ASSESSMENT

On paper, this is the first budget since Oslo that treats Judea and Samaria, the Jordan Valley and the Negev as the country's backbone, not as bargaining chips. In practice, the politics are knife-edge: if the Haredi parties decide coalition funds matter less than shielding draft-dodging, they can blow up the budget and drag Israel into further political chaos in the midst of a regional war. Add the fact that zero new money was allocated to stop “environmental terror” waste fires choking border communities, and you see the tension. The state is finally investing in real territorial depth and force buildup, but still struggles to fund basic protections for the civilians who comprise that shield. The direction is right; the follow-through is lagging.

Draft Law, Wounded Bodies, and the Moral Ledger

On the Knesset's National Day of Appreciation for Wounded Soldiers, Alon Kaminer — who lost two hands, a leg, and an eye in the war — sat in front of MKs and said what too many politicians are afraid to: Jews are first in rights here, so they must be first in duties, and anyone not actually learning Torah should be in uniform. Bereaved Rabbi Ohad Teharlev hammered the same point. His son spent two years in yeshiva learning and volunteered for combat. “We are afraid how they'll come back” rings obscene when some don't come back at all. Ofir Sofer, trying to build a bridge instead of a bonfire, laid out a gradual track — 2,400 genuine Haredi recruits into Hashmonaim as a first, real number — while warning that sanctions alone will backfire without trust and frameworks that the rabbinic world can live with. Behind them all sits the Defense Ministry's raw math: 22,000 new wounded added since October 7, 58% of them with mental-health injuries, and a rehab system racing toward 100,000 wounded by 2028 with half battling PTSD.

ASSESSMENT

The country is bleeding from every sector, and the only people still talking about “time” on the draft are the ones not paying the price in hospital corridors and rehab centers. Sofer’s incrementalism is tactically smart, but the strategic truth is exactly what Kaminer said: this is no longer about “recruiting Haredim,” it’s about holding adults to account in a Jewish state that has run out of room for professional shirkers. The Torah doesn’t license cowardice—in deed it calls for full participation in defence of Am Yisrael. The sooner the law reflects that — with real verification, real numbers, and one standard regardless of what sits on your head — the sooner Israel will have the army it needs for the war it is actually in.

Courts, Citizenship, and Who Gets to Piggyback on a Jewish State

In a 6–1 ruling, the Supreme Court reversed its own months-old precedent and held that non-Jewish children of immigrants under the Law of Return do not get automatic citizenship. They must naturalize via the regular, slower track. Legally, the majority is right on the core distinction: the Law of Return is an emergency on-ramp for Jews and their close kin, not a loophole to fast-track every non-Jewish relative who happens to be in the family orbit. Practically, the Clement case shows how cold that looks when the father lied on his aliyah paperwork, four kids eventually got status, and seven other children were left in a no-man’s land for years while the Court and Interior Ministry played jurisdictional ping-pong. The justices tossed the humanitarian fix back to the Knesset and told the interior minister to use “discretion” to avoid stateless children — a nice way of saying, “we’re not going to solve this, you do it.”

ASSESSMENT

Israel is absolutely right to guard the Law of Return’s Jewish core and insist that non-Jewish immigration runs through a controlled naturalization track. However, they are more than a little ridiculous about it. But a sovereign Jewish state that can mobilize half a million reservists in a week can also manage to write a law that keeps citizen-children and their parents on the same page without a bureaucratic maze. The Court’s course-correction on the doctrine is welcome. Its willingness to leave real kids in limbo and call it “for the Knesset to decide” is exactly the technocratic evasiveness that has eroded public trust. A serious government will now do what the Court wouldn’t: close the loophole and close the gap.

Who Commands the Sword Arm? Katz, Zamir, and Netanyahu’s Long Game

The fight between Defense Minister Israel Katz and IDF Chief Eyal Zamir over senior appointments has moved past “technical dispute” and into an open struggle over who shapes the army’s future identity — with Netanyahu now clearly backing Katz’s push. Act One of this relationship saw Zamir brought in as the anti-Halevi: aggressive on Gaza, hard on refuseniks, the chief who presided over the June strike that set Iran’s nuclear program back two years and retired a generation of officers Netanyahu and Katz distrusted. Act Two was the turn: Zamir hardened against more Gaza incursions once the hostage risk became clear, spoke louder on Haredi service, and started insisting on professional prerogatives over appointments, while Katz launched a new Oct 7 probe and sat on key promotions as leverage. We’re now in Act Three: Katz

freezing all senior postings for at least 30 days under cover of his Volansky review, floating outside names for top roles, and signaling that no corner of the General Staff will stay beyond political reach.

ASSESSMENT

Elected civilians are supposed to set strategy and hire security chiefs. That's democracy, and the days of untouchable "gatekeepers" running their own foreign and security policy need to end. But there's a line between reasserting control and turning the General Staff into a patronage board. Netanyahu's instincts about Mossad, Shin Bet and parts of the old IDF elite were largely vindicated by October 7. His danger now is overshooting — breaking professionalism in the name of loyalty just when Israel needs a ruthlessly competent sword for the northern round. The right balance is brutal but simple. Civilians set goals and red lines whilst the generals pick tactics and people. And they all must answer to the same political echelon. Anything else is either a coup or a court-martial in slow motion.

Israel and the World

Israel Opens the Door to Peace—If Lebanon Cuts Iran's Leash

Israel's ambassador to Washington, Yechiel Leiter, delivered a blunt message directly to the Lebanese public: Israel wants peace, but Hezbollah must go. His video address came just as Beirut pretends it will disarm the terror army by the U.S.-Israel year-end deadline — a deadline everyone knows is actually aimed at Tehran, not the parliament in Beirut. Leiter tied Lebanese economic revival to ending Iran's proxy control and stressed what Jerusalem has been saying for months and months. Israel has no interest in Lebanese land, only in stopping Iranian missiles being fired from it. He referenced the U.S.-brokered Naqoura talks and highlighted the mutual upside of maritime trade and energy cooperation should Lebanon ever reclaim sovereignty from the IRGC. His framing was precise: Hezbollah's fire brings war; its disarmament brings the economic horizon normal countries enjoy. And it lands as Israeli jets dismantled Hezbollah's southern depots and U.S. envoys warn Baghdad that any Iraqi militia support for Hezbollah will trigger Israeli strikes inside Iraq.

ASSESSMENT

Israel is shaping the battlespace and the narrative. Hezbollah is not Lebanon's "resistance," it is Iran's jihadi occupation force. By bypassing Beirut's political class and speaking to Lebanese civilians, Israel exposes the real map — one where Lebanon's prosperity is hostage to a foreign militia that answers to Qom. If Hezbollah refuses disarmament by Dec. 31, the next phase will be kinetic, not diplomatic. Leiter's message is the opening brief for Abraham Accords 2.0: peace is on the table, but only for states that control their borders and their guns.

Qatar Says No to Rebuilding Gaza, Yes to Rewriting the Narrative

Qatar's prime minister used the Doha Forum to wash his hands of Gaza's reconstruction, declaring that Doha "won't write the check" for the devastation

— while insisting, naturally, that Israel destroyed Gaza single-handedly. A government spokesperson later tried to soften the blow, saying Qatar will pay only if others join, but the message stands. Qatar wants the political leverage of “mediator” status without the financial responsibility of fixing the ruin its own Hamas clients created. Doha also reminded the world that past Israeli governments approved Qatari money flows into Gaza — a PR maneuver meant to absolve itself while ignoring that Qatar hosted, funded, and protected Hamas’s leadership throughout. In parallel, Turkey and Qatar are now actively lobbying to preserve Hamas’s power in Phase II by pushing plans to “store” weapons under PA custody or supervised lockers — anything that keeps Hamas’s finger on the trigger. Meanwhile, Qatar frets that critics are “sabotaging” its relationship with Washington as Tucker Carlson buys a villa in Doha (so much for “America First”) and Qatar boasts of funding millions in U.S. lobbying to protect its influence.

ASSESSMENT

Qatar has no intention of dismantling Hamas — only of repositioning and strengthening it. Its refusal to bankroll reconstruction is not fiscal prudence, it’s strategic leverage. Doha wants to remain indispensable to Washington and indispensable to Hamas, without being accountable for the consequences of either. Any Western official still calling Qatar a “mediator” is either compromised or unserious. Israel should treat Doha’s rhetoric as part of the battlespace — soft-power IRGC, in linen suits.

From Turkey’s Cash Pipes to Toronto Ubers: Iran’s Network Grows, the West Wilts

Israel released hundreds of documents proving Hamas runs an Iran-directed currency network operating openly in Turkey, using Gazan expatriates and money changers to funnel millions to Hamas leadership — a stark reminder that NATO territory hosts the financial arteries feeding the war. But the West doesn’t really care. At the same time, Qatar’s Doha Forum produced a spectacle of Western self-abasement: U.S. envoy Tom Barrack stunned even that room by implying Israel isn’t a democracy and praising “benevolent monarchy” as the Middle East’s natural form — a gift to every regime that wants to delegitimize the Jewish state while pocketing American arms. Meanwhile, antisemitism in the West tightens: a Canadian model was kicked out of an Uber for being Jewish. British Conservatives are demanding deportation of foreign students engaged in antisemitic intimidation—about time, but hardly enough. Brussels graffiti now targets nativity scenes with “Free Palestine” slogans—if Israel is the “little Satan,” remember where the real target lies. Lisbon’s memorial to murdered Jews was vandalized with neo-Nazi codes. Milan’s Christmas market next to the Duomo faced Islamist intimidation. And while these fires spread, Trump reiterated the only geopolitical truth that has aged well in the last decade: Jerusalem is Israel’s rightful capital and the anchor of any real peace.

ASSESSMENT

Israel is fighting a multi-front war in which the West remains nominally an ally and, more realistically, a liability. Turkey hosts Hamas's money men. Qatar hosts its leadership. Western universities host its foot soldiers. Western diplomats host its narratives. The good news is that Israel has finally stopped pretending otherwise. The exposure of Iran's Turkish laundering network, combined with growing Western intolerance for open antisemitism, is shifting the Overton window: this isn't a "conflict," it's a global proxy campaign. Israel's job is to treat every arena — Istanbul, Toronto, London, Brussels, Doha — as part of the operational map. And it is starting to.

Briefly Noted

FRONTLINE & SECURITY

- **Iran's Regime Escalates Repression:** Iran escalated with the murder of human-rights lawyer Khosro Alikordi, the disappearance and torture of activist Bitá Shafiei and her mother, and arrests over women running a marathon without hijab. It shows a regime so brittle it must criminalize jogging.
- **Hamas Extortion Within Gaza:** Hamas abducted one of Gaza's wealthiest merchants, Fadi a-Dayeb, and forced him to pay millions in ransom, even as clans reject his attempts to buy forgiveness for collaborating with Hamas's wartime extortion system. This reveals the real "governance" in Gaza: a mafia running out of cash and legitimacy.
- **FIFA's Pride Match Hypocrisy:** FIFA assigned a Seattle "Pride Match" to Egypt and Iran — one criminalizes LGBTQ+ identity, the other executes it. It's a perfect snapshot of Western institutions that preach inclusion.

DIPLOMACY & GEOPOLITICS

- **Iran Abandoned Assad:** New reporting shows the IRGC abruptly abandoned Assad days before Damascus fell, torching documents and fleeing to Russia as rebels closed in. The revelation shatters the myth of Iranian steadfastness.
- **Norway's Artist Problem:** Norwegian authorities approved a government-building commission for an artist who publicly celebrated Hamas's October 7 massacre as "creative resistance." Europe keeps proving it recognizes terror selectively.

ECONOMY, TECH & INFRASTRUCTURE

- **Lufthansa's Arms Embargo:** Lufthansa Cargo imposed an arms-transport embargo on Israel, blaming a British export-control directive. It's a reminder of historical patterns.

CULTURE, RELIGION & SOCIETY

- **Tarantino's Zionist Commitment:** Daniella Pick described life in Tel Aviv with Quentin Tarantino, who insisted on staying through the war and quipped

about dying as a Zionist. Israel's cultural gravity keeps pulling in people who could live anywhere.

- **London's Menorah Light Show:** London's Trafalgar Square menorah now shoots eight aviation-approved beams of light hundreds of meters into the sky. In a Europe increasingly cowed by mobs, Britain just green-lit a Jewish lighthouse.
- **Toronto's Discrimination Case:** A Toronto Uber driver expelled a passenger after hearing she was Jewish, triggering a discrimination complaint and public outrage. It's yet another example of Western corporations sleepwalking through Jew-hatred.

Developments to Watch

Gaza & Southern Theater

- **Hamas Tries a "Soft Pivot" While Keeping Its Guns** — Al-Hayya and Bassem Naim floated language about "searching for bodies" and "freezing" weapons, even as Hamas reaffirms it won't disarm and demands Israel withdraw. This is narrative prep for Phase II without delivering anything that Phase II requires, and the dissonance will break the choreography in the next 48–72 hours.
- **Qatar Moves to Redraw the Ceasefire Terms** — Doha now says there is "no ceasefire" unless Israel withdraws from Gaza entirely. No one should be left wondering if Qatar intends to overwrite the Trump plan's sequencing and rescue Hamas's veto in Phase II. For the slower amongst the class: they fully intend to do so.
- **Yellow Line Hardens Into a Border** — Zamir declared the Yellow Line the IDF's forward defensive and offensive boundary, and forces killed another infiltrator near Rafah. If mediators thought Israel was bluffing about staying put until Rafah's command is dead and Ran Gvili comes home, the IDF just removed the ambiguity. **LIKELY TO ESCALATE**

Northern Front (Lebanon / Syria)

- **Hezbollah Infrastructure Dismantlement Accelerates** — The IDF fully destroyed another tunnel and weapons depot in southern Lebanon, even though it was "inactive." Israel is clearing dormant grids before they can be reactivated, tightening the noose ahead of the Dec. 31 disarmament deadline. **LIKELY TO ESCALATE**
- **UNIFIL Signals It Will Not Police Hezbollah** — UNIFIL's commander publicly said his mission doesn't inspect buildings and sees "no evidence" Hezbollah is rebuilding south of the Litani. That admission leaves the deterrence burden entirely on Israel and shortens the fuse on a preemptive campaign.
- **Lebanon Receives U.S. Tactical Trucks** — Washington delivered \$91m in heavy vehicles to the Lebanese Army even as Beirut admits it can't disarm

Hezbollah. Arming an institution that defers to Hezbollah's gunmen deepens the ambiguity Israel will face in any northern push.

- **Turkey and Syria Eye Joint Operations Against U.S.-Backed Kurds** — Turkish armor crossed into Syria from three axes, with Ankara's press floating a joint Turk-Syrian assault on the SDF by year's end. A Turkish-Damascus alignment would destabilize the northern corridor. **LIKELY TO ESCALATE**

Judea & Samaria

- **Sixty Infiltrators Breach the Fence Near Lachish** — Dozens of Arab infiltrators entered Israel overnight from Judea; police and army searches are ongoing. Even if most are labor migrants, the volume underscores the security vacuum Hamas and Iran hope to exploit.

Regional Axis (Iran, Houthis, Militias)

- **Iran Tries to Recast Its Hamas Role as U.S.-Requested** — Qatar's PM claimed Doha hosted and funded Hamas "at the request of the U.S." — an unmistakable attempt to sanitize the terror pipeline before Phase II negotiations. It hints at a coming global messaging war.
- **Iraqi Militias Re-Warned: Intervention = Israeli Strikes** — U.S. envoys again told Baghdad that any militia move to support Hezbollah will bring Israeli strikes inside Iraq. The message binds Washington to Israel's northern escalation. **LIKELY TO ESCALATE**

Diplomatic & Legal

- **Egypt Conditions a Netanyahu-Sisi Summit on Israeli Concessions** — U.S. officials say Sisi will only meet Netanyahu if Israel signs a strategic gas deal and advances other Egyptian demands. It's leverage wrapped as diplomacy.

Home Front & Politics

- **Waste-Fire Crisis Still Unfunded** — Despite 736 waste-fire incidents and toxic smoke reaching Tel Aviv, the 2026 budget includes zero new funds to fight what the Environment Ministry labels "environmental terrorism." It's a governance gap with real political risk.
- **Oct. 7 Probes Edge Toward Open Confrontation** — Southern Command's chief refused, for now, to testify to the State Comptroller about Oct. 7. It's a sign that the legal-military confrontation is entering a new phase.

Closing Analysis

CLOSING this out, three things moved from "discussion" to "fact." First, Gaza's map: when the IDF chief tells his commanders that the Yellow Line is now a new border line, and the army continues to kill anyone who tests it, that's not a negotiating position; it's a reality marker. Any Phase II that

assumes Israeli forces are going home while Hamas keeps an underground army is already dead. The only thing left to decide is how loudly foreign capitals admit that.

Second, the northern clock: with another Hezbollah tunnel gone, an ultimatum circulating about weapons north of the Litani, U.S. trucks flowing to the Lebanese Army, and UNIFIL openly announcing it will not police Hezbollah. Tehran holds the fuse, but Israel is clearly preparing the match.

Third, the home front's moral ledger: a budget that arms Judea, Samaria and the Jordan Valley, a draft debate led in part by a soldier with no hands, a leg or an eye, and court rulings that protect the Jewish core of the Law of Return while leaving real children in limbo — all of it points to the same tension between a state that wants to live and systems that still want to behave as if this is 2015. Time to come together.

Coming soon: Cairo will either move on Ran Gvili or admit it cannot. Hamas will keep trying to sell “stored” weapons as disarmament. Qatar and Turkey will test how far Washington can be dragged. Up north, every tunnel the IDF demolishes shortens Iran's options. Inside, Herzog's eventual answer on the pardon and Katz's dance with Zamir will tell us whether Israel goes into the northern round with one clear chain of command or with a prime minister spending his workdays in a courtroom. The war is already choosing its calendar. Our job is to choose whether we meet it as a serious state or as the audience to someone else's script.

— Uriel Zehavi · *Intelligence Editor With Modi Zehavi* · Data + Research Analyst

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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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