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READER EDITION

December 11, 2025

ISRAEL BRIEF

Thursday, December 11

Ran Gvili's body, the Yellow Line, and an unfinished constitution all say the same thing: no more pretending the rules are something other than force, borders, and who actually holds the pen.

◇ URIEL ZEHAVI

THE BOTTOM LINE The region sorts into two camps with less camouflage. One side demands guns stay while others pay; the other understands no “day after” exists with armed jihad movements intact.

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Israel Brief: Thursday, December 11

Ran Gvili's body, the Yellow Line, and an unfinished constitution all say the same thing: no more pretending the rules are something other than force, borders, and who actually holds the pen.

Flash Brief

- **Gaza:** Israel conditions Phase II on Ran Gvili's return; Hamas rejects disarmament
- **North:** Storm Byron reduces surveillance while Hezbollah repositions; US warns Israel may strike Dahieh and Bekaa if precision missiles aren't surrendered by year-end
- **Iran/Axis:** Tehran demands "wartime" IAEA safeguards; proxies probe Jordan corridor
- **Judea & Samaria:** Mass arrests precede Hamas Foundation Day; new Tulkarm bomb cell exposed
- **Inside Israel:** Attorney General opposes draft bill; government advances Eastern Negev growth plan
- **Diplomacy:** Washington considers UNRWA terror sanctions; threatens ICC penalties
- **Diaspora:** Hamas baby formula hoarding revealed; Amnesty calls Hamas actions "crimes against humanity"

The War Today

HAMAS PLAYING ITS LAST CARD WHILE ISRAEL HOLDS THE DECK

Islamic Jihad falsely claimed returning all hostages. Israel responded by releasing photos and coordinates proving Ran Gvili's body remains missing. His parents publicly reject any Phase II without his return. The IDF continues engineering works along the Yellow Line and eliminating infiltrators. Trump's envoy discusses Palestinian "technical authorities" and 2026 ISF deployment, but Hamas leadership explicitly rejects disarmament as "separating soul from body."

ASSESSMENT

Gvili's body becomes a national red line forcing diplomatic capitals to choose between their timelines and Israeli reality. The Yellow Line's physical expansion makes Gaza's division increasingly permanent rather than temporary.

IRAN REWRITES NUCLEAR RULES; MILITIAS PROBE JORDAN; WASHINGTON SIGNALS FATIGUE

Iran demands IAEA revise inspection safeguards, claiming "normal rules don't apply during war." It refuses immediate facility access and demands inspection data protection. Meanwhile, Iraqi militias and Houthis telegraph Jordan corridor probes. Syrian forces discovered with missiles. Israeli officials warn Damascus understandings are slipping. A Hezbollah outlet reports US warnings that Israel will strike Dahieh and Bekaa if precision missiles aren't surrendered by year-end.

ASSESSMENT

Tehran rebuilds under rhetorical cover while proxies test Jordan's capacity. US diplomacy with Syria — combined with Caesar Act repeal signals — suggests Tehran believes Washington will eventually tire of enforcement.

ANTI-HAMAS MILITIAS MULTIPLY; HAMAS MEDIA COLLAPSES; JUDEA & SAMARIA LOCKED DOWN

After a Hamas commander's death, his successor inherited 400 new fighters joining anti-Hamas forces. Hamas executes collaborators while managing occupation zones. Revelations show "the vast majority" of Gaza's killed "journalists" were Hamas or PIJ operatives. IDF mass arrests precede Hamas Foundation Day across Judea and Samaria. A new Military Advocate-General builds legal frameworks for victory.

ASSESSMENT

Gaza's insurgency diversifies where IDF pressure persists. Hamas's press infrastructure collapses as its combat role surfaces. Judea and Samaria becomes a continuous battlespace rather than partitioned territory.

Inside Israel

GOVERNMENT PUSHES SERVICE; AG DEFENDS STATUS QUO

The Attorney General opposes the conscription bill, claiming it won't increase Haredi enlistment because it lacks "equality incentives." The Haredi parties deny the IDF's need for 12,000 additional recruits. Religious Zionism held an emergency rabbinic summit and emerged backing the draft only if it produces real, trackable enlistment. Several rabbis warned against "shaming Hesder" students carrying half the war effort. Netanyahu framed it as beginning "a historic process."

ASSESSMENT

Israel cannot fight multiple threats with a 1992 manpower model. The AG defends theological fiction. The coalition inches toward universal service with equity, without exemptions or blackmail.

ENERGY DOCTRINE SHIFTS: NUCLEAR, NEGEV SOVEREIGNTY, NO MONOPOLY

Energy Minister Eli Cohen confirmed serious nuclear power preparations (not fantasy versions). With electricity demand doubling in 20 years, coal alone cannot power an AI economy or wartime operations. Natural gas exports near a historic \$35 billion Egyptian agreement. Cohen killed Treasury attempts to grab ministry authority and announced the Electric Corporation monopoly's end. He proposed relocating the Haifa refinery to the Negev, strengthening jobs and national redundancy.

ASSESSMENT

Israel's energy portfolio matures with nuclear resilience, gas leverage, settlement integration, and state-like behavior without apologies.

NEGEV POLICING: OPERATION “NEW ORDER”

New National Security policy treats Bedouin criminal militias as security threats. Operation “New Order” targeted weapons, rockets, and clan violence in Lakiya, Hura, and Rahat — the same areas that funneled weapons north for Iran-linked smuggling. Jewish towns report safer roads. Critics cry “martial law,” but local residents privately admit they want criminals stopped.

ASSESSMENT

The doctrine is simple: crimes are crimes, not cultural artifacts. Israeli citizens receive law and order, not excuses.

Israel and the World

TWO-TIER POLICING; ONE SHARED HAMAS PROBLEM

A British conservative think tank documented “two-tier policing” by London’s Metropolitan Police — clamping down on Jewish and right-wing events while permitting anti-Israel mobs screeching jihad support. European security services now charge Hamas-linked cells for locating arms depots and preparing attacks in Germany. Palestinian Authority schools officially display children holding “sweet-smelling martyrs” signs and maps erasing Israel. Wikipedia deleted pages a bereaved Israeli wrote about his murdered, abducted sibling, citing rules mysteriously unapplied elsewhere.

ASSESSMENT

Europe spent decades assuming Hamas would only kill Jews in Israel. That illusion is dead. This is “one continuous battlespace: London, Berlin, Ramallah, campus quads, Wikipedia editing slacks.”

SERIOUS FRIENDS DOUBLE DOWN WHILE EUROPE WOBBLER

The US House passed a \$900+ billion defense bill with Israel provisions: \$500 million joint missile defense, \$80 million anti-tunnel work, \$35 million AI/cyber R&D. Taiwan’s deputy foreign minister visited Israel for defense talks. Modi and Netanyahu held a warm call; India now calls Hamas terrorist without reflexive UN opposition. Washington simultaneously considered adding security theater — mandatory social media disclosure for Israeli ESTA applicants — despite this stopping “zero serious terrorists.”

ASSESSMENT

Countries mattering for Israeli survival — US, India, Taiwan, East Asia, Gulf states — tighten military and tech cooperation. The real democracies bet on Israel as arsenal partner, not problem.

SYRIA DRAGS FEET; QATAR WASHES HANDS; ISRAEL TIGHTENS GRIP

Qatar’s PM announced Doha won’t fund Gaza reconstruction, suddenly discovering fiscal restraint after bankrolling Hamas for a decade. Foreign Minister Gideon Sa’ar is explicit: Phase II requires real disarmament and demilitarization, not “storage” games. He publicly acknowledges Iran hasn’t abandoned any programs. Syria demands new concessions just as US sanctions

relief looms. Israel retains Hermon positions as “major strategic asset.” Bolivia restored relations, signaling shift from Iran-aligned axis.

ASSESSMENT

The region sorts into two camps with less camouflage. One side demands guns stay while others pay; the other understands no “day after” exists with armed jihad movements intact.

Briefly Noted

FRONTLINE & SECURITY

- Gazan activist Ahmed Fouad Alkhatib published footage of Hamas hoarding then dumping tons of baby formula hidden during peak hunger — confirming Israeli claims and undermining NGO narratives.
- Amnesty International released a report calling Hamas actions “crimes against humanity” including murder, extermination, torture, rape, and systematic hostage abuse.
- An IDF Instagram post accidentally revealed sensitive central Israel base blueprints before removal.

DIPLOMACY & GEOPOLITICS

- Lebanon’s foreign minister declined Tehran invitation, proposing neutral ground and emphasizing only the Lebanese state should hold weapons — signaling Hezbollah’s radioactivity.
- Saudi Arabia and Iran reaffirmed the China-brokered agreement while calling for end to Israeli “aggression,” hedging between China mediation and potential future US-Iran channels.
- The Trump administration seriously explores UNRWA terrorism sanctions, potentially including FTO designation — formally admitting what Israel said for years about UNRWA’s Hamas entanglement.

CULTURE, RELIGION & SOCIETY

- UK Home Secretary canceled Pakistani influencer Tuaha Ibn Jalil’s visa over antisemitic conspiracy theories and jihad calls.
- Tel Aviv’s CyberWell reports surge in coded online antisemitism using “juice,” “tiny hat,” and devil emojis to evade moderation, especially TikTok.
- Network Contagion Research Institute found Holocaust denier Nick Fuentes receiving unusually fast, concentrated shares — many foreign or automated — giving retweet velocity exceeding Elon Musk’s.

Developments to Watch

JUDEA & SAMARIA

- Mass arrests (~100 operatives) before Hamas Foundation Day, including Gilboa escapee Muhammad al-Arda — pre-empting coordinated Hamas demonstrations
- Tulkarm bomb cell rebuild; Shin Bet exposed network tied to multiple IED ambushes including a blast injuring a regional brigade commander

NORTHERN FRONT (LEBANON/SYRIA)

- Storm Byron opens retaliation window; Hezbollah relocates operatives while weather reduces aerial ISR
- American warning reported via Hezbollah outlet: Israel will strike Dahieh and Bekaa if precision missiles remain past December 31
- Warning shots near Metula triggered UNIFIL complaints despite legitimate IDF intruder engagement
- Damascus injected new demands into negotiations as US sanctions relief looms

GAZA & SOUTHERN THEATER

- Engineering brigades expand Yellow Line earthworks around Khan Yunis and Salah al-Din Road, hardening de facto border faster than diplomats pretend it's temporary

REGIONAL AXIS (IRAN, HOUSHI, MILITIAS)

- Iran demands IAEA rewrite inspection framework to shield nuclear-site damage from “enemy exploitation”
- Houthi official dismissed Saudi-Iran defense pacts as irrelevant to their campaign
- Iraqi and Yemeni militia chatter references rapid-drive Jordan Valley incursion routes

DIPLOMATIC & LEGAL

- Washington briefs about 2026 ISF deployments despite Israeli red line on Ran Gvili return
- UNRWA terrorism designation seriously explored; floating this destabilizes donor pipeline and forces allies to choose

HOME FRONT & POLITICS

- IDF blanket freeze through Friday on training and troop releases exposes wartime manpower fragility
- Government approved NIS 100m Eastern Negev 2026 plan: airfield planning, police build-up, education, transportation
- Education Ministry ordered nationwide student mobile phone ban on school grounds starting February 2
- Coalition hints at recognizing ZAKA and United Hatzalah service tracks as Haredi conscription alternatives

Three Takeaways

1. **Gaza:** The line is explicit — no Ran Gvili, no Phase II. Every Yellow Line fortification and dead infiltrator makes the strip less temporary and more permanent, directly contradicting Hamas and sponsor narratives.
2. **The Region:** Iran isn't moderating; it's editing. Demanding “wartime safeguards” while ramping missiles and letting proxies eye Jordan and the Gulf reveals intentions clearly. Storm Byron compresses the clock — if Hezbollah miscalculates under cloud cover, December 31 may arrive early.

3. **The State Itself:** A serious energy doctrine, long-war budgeting, and draft reframed as duty rather than identity align law and manpower with actual war. The problem: still shackled to an improvised constitutional arrangement where the Court wrote itself as final guardian without anyone signing the bottom.

Note: Later this morning, a separate Dossier titled “The Unfinished State” examines Israel’s constitutional architecture: one hyper-empowered court, hyper-fragile Knesset, incomplete constitution.

Final Assessment: “Israel’s job is to stop letting other people’s timelines rewrite our red lines. The bigger job, which can’t wait forever, is to finally write down who gets to draw those lines in the first place.”

ABOUT THE AUTHOR

Uriel Zehavi

EXECUTIVE DIRECTOR · MITZPE INSTITUTE

Uriel Zehavi is the executive director of Mitzpe Institute, where he writes the daily Israel Brief and co-directs its Institutional Intelligence practice with Modi Zehavi. He is the author of four books from Mitzpe Press and advises Israeli and allied clients on strategic communications for Western audiences.



ABOUT MITZPE INSTITUTE

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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