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READER EDITION

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ISRAEL BRIEF

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Things get noisier as the calendar page flips.

◇ URIEL ZEHAVI

THE BOTTOM LINE Geography still beats press releases. Somaliland recognition shows chokepoints don't care about consensus statements. India shows capability partnerships outlast mood swings. Tourism matters because people don't book flights to countries they think are finished—though it feels like most of that 1.3M are currently here (based on crowds and traffic). Israel is rebuilding strategic depth while others argue about optics.

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Happy New Year, friends.

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As we enter 2026, it doesn't feel like we've moved too far onwards even though the calendar switches. Gaza remains in its weapons-seizure stand-off. Lebanon's "deadline" hits midnight with no disarmament in sight. Iran is facing massive civil unrest while the regime hints it may export its panic. Process keeps trying to seize the steering wheel and reality keeps running it off the road.

Here's the situation in ninety seconds.

Flash Brief

- **Gaza:** IDF holds the Yellow Line and finds a loaded launcher near Beit Hanoun. See The War Today.
- **Hostages:** Phase Two discussion waits on Ran Gvili's return for burial. See The War Today.
- **Northern Front:** U.S. disarmament ultimatum expires. Israel prepares for renewed fighting. See The War Today.
- **Iran:** Protests deepen as Tehran runs drills and claims cyberattack pressure. See Developments to Watch.
- **Red Sea:** Houthi threats spike as Somaliland geometry tightens a choke point. See Israel and the World.
- **Home Front:** Negev retaliation cycle and draft-law crunch collide into state-capacity pressure. See Inside Israel.
- **Lawfare:** ICJ momentum and UN bureaucracy keep minting constraints at scale. See Israel and the World.

Gaza stays about denying rebuild and forcing a weapons-seizure outcome. Lebanon stays about making Hezbollah's inventory perishable when Beirut refuses the job. Iran stays about internal stress turning into external miscalculation.

The War Today

Gaza "Phase Two" Collides With One Problem: Hamas Still Has Guns

Hamas is trying to walk into 2026 wearing a blazer over a suicide vest: governance talk on top, arsenal underneath. IDF forces continue dismantling infrastructure near the Yellow Line in northern Gaza, including locating a loaded rocket launcher in Beit Hanoun prepared for imminent fire into Israel. Senior command messaging keeps the line firm: disarm Hamas, prevent rebuild, bring Staff Sgt. Ran Gvili *z"l* home for burial.

Politically, the U.S. is explicitly chained to that reality—Phase Two discussions begin only after Ran's return, with the Gvili family receiving direct assurances that "no Phase Two" moves first. Meanwhile Hamas officials openly call disarmament "detached from reality," which is an elegant way to say: "we'd like to keep the rifles and also have you fund ruin removal."

Hamas's internal political bureau succession fight (Mashal vs. al-Hayya) and reports that a Shalit-deal returnee, Ali al-Amoudi, now functions as the de facto political bureau manager inside Gaza, has Hamas in a period of further instability. Add the new Israeli ban on dozens of aid groups from operating in Gaza for failing vetting requirements (including major international medical actors), and its easy to tell we have a long way to go ahead of us.

ASSESSMENT

Gaza is still the world's easiest IQ test, and many capitals remain determined to fail it with honors. The hope entering the new year is that the next phase won't move until Ran is finally returned. If anyone wants a role in Gaza's future, they can start by volunteering for the job that involves confiscating 60,000 rifles and not getting shot while doing it.

Washington Shrugs; Israel Prepares To Make Rebuild Perishable

The U.S. ultimatum to Lebanon to dismantle Hezbollah weapons has been reached and the numbers tell you how seriously Lebanon took it. With more than two thousand Hezbollah ceasefire violations, the Lebanese Army can claim five hundred or so enforcement actions. That gap is a choice—and a bad one at that. Israel's security leadership is openly bracing for possible fighting as the clock turns.

Trump's message to Netanyahu on Hezbollah is simple and unusually operational. Hezbollah must be completely disarmed, and if the Lebanese army fails to do it and Israel judges action necessary, the U.S. will not intervene to stop Israel. Hezbollah is reading it as a potential green light.

ASSESSMENT

Lebanon keeps attempting the same magic trick: swap disarmament for "dialogue," and call the lack of enforcement "stability." Hezbollah's favorite part of this routine is that it gets to keep the rockets while the world blames Israel for noticing the rockets. The hopeful note for 2026 is that the enforcement fiction is wearing thin and Washington's language is finally closer to reality. Sadly, Beirut still thinks calendars dismantle inventories. If the Lebanese state won't seize the weapons (and truly it will not), then the weapons remain an Israeli problem.

Judea & Samaria: Attacks Drop, Pressure Rises, Access Gets Choked

Year-end security reporting shows terror fatalities in Judea and Samaria fell to 20 in 2025 (down from 34 in 2024 and 41 in 2023), attributed to intensified operations and the sustained degradation of terror networks in northern Samaria's "refugee camps"—an unglamorous success measured in lives not lost. That campaign now includes heavy shaping in the Tulkarm-area: demolitions in Nur al-Shams began again, with additional structures slated for removal — an operational necessity to expand freedom of movement and prevent booby-trapped alleyways and "operational apartments" from functioning as command nodes.

The IDF's broader 2025 summary reinforces the manpower truth the coalition keeps trying to negotiate away: 306,000+ reservists fought. 54,000 previously exempt Israelis were pulled back into reserves. 151 soldiers fell in 2025 with hundreds wounded. And finance-defense planning reportedly cutting planned reserve call-ups next year. Meaning fewer people will carry more load.

ASSESSMENT

The decline in fatalities is what effective pressure looks like when it's sustained—camps degraded, weapons constrained, freedom of operation enforced. The same year that produced fewer deaths also produced more proof that access and mobility are the enemy's cheapest weapon system. The hopeful message entering 2026 is that disciplined enforcement works—and it works without needing permission from foreign lecture circuits.

Inside Israel

Governance By Injunction Meets Reality

Israel closed 2025 with its institutional organs working against each other in full force and without bothering to hide it behind closed doors. The Supreme Court issued interim orders freezing the State Comptroller's October 7 investigations, halting a parallel accountability track just as the Knesset advanced its own inquiry framework. The judicial complaints commissioner dismissed nearly all ethics complaints against the Chief Justice, upholding only a single disclosure failure without recommending sanctions—prompting Justice Minister Levin to demand resignation anyway and igniting another round of public trench warfare between the executive and the bench.

Levin also ordered the cancellation of a politically branded conference scheduled inside the Supreme Court building—framing it as misuse of public judicial space. While ministers escalated rhetoric against what they describe as an unelected veto class. Qatargate allegations continued to metastasize around the Prime Minister's Office, tying questions of influence and leaks directly to wartime decision-making.

ASSESSMENT

When courts suspend comptrollers, ministers try to police judges, and accountability becomes a procedural cage match, enemies don't need to penetrate systems—they just wait for them to stall. The risk is that the public concludes no side governs. The hopeful note, if there is one, is that the fault line is now unmistakable and therefore unavoidable. Israel is relearning—expensively—that Basic Laws without a constitutional settlement invite an activist judiciary that operates outside of their remit. That structural vacuum cannot be tolerated—but it needs to be dealt with without the partisan theatrics. Israel deserves better.

From The Negev To Gaza NGOs, Transparency Or Exit

Both the National Police and the Border Police flooded Tarabin al-Sana after retaliatory arson attacks in Lehavim—arresting suspects, seizing weapons,

and forcing the Shin Bet into a domestic crime-security overlap zone. The IDF quietly raised readiness around southern bases amid fears that criminal retaliation could bleed into military targets.

Simultaneously, Israel moved to suspend licenses of international NGOs that refused security vetting or disclosure requirements, citing evidence of terror-linked staff—including in high-profile medical organizations—while emphasizing that aid flows continue through compliant channels. Critics cried “collective punishment.” The state replied with numbers: the affected groups represent a small fraction of aid volume, and governance failure is not a humanitarian principle.

Against this backdrop, one data point cut through the noise: the Gaza envelope population now exceeds pre-October 7 levels, with tens of thousands returning and new residents arriving—rebuilding under fire rather than waiting for perfect conditions.

ASSESSMENT

Ungoverned space always fills—if not with police, then with criminal clans, militias, or NGOs that double as political actors. The Negev operation and NGO enforcement are the same doctrine in different accents: transparency or exit. There is hope for this next year, especially as more people vote with their feet, and they are coming back—not necessarily because it's safe, but because it's theirs.

Israel and the World

Lawfare Scales While Antisemitism Gets Rebranded

International pressure continued its industrial pace. Belgium joined the ICJ case as UN bodies kept minting “authoritative” paperwork that migrates into NGOs, campuses, and courts. The U.S. pledged \$2 billion to UN humanitarian channels with reform language attached—less than historic levels, but still routed through officials who previously circulated intentionally inflated, erroneous claims about Gaza.

In Europe and the Anglosphere, antisemitism is increasingly managed as a communications problem rather than a security threat. Selective enforcement on campuses, ritual condemnations after attacks, and rapid reframing of Jew-hatred as “political expression.” The result is obvious and predictable—more vandalism, more arson, more intimidation, and the normalization of Hamas-adjacent iconography in public space.

ASSESSMENT

Paper creates permission. Permission creates violence. Then institutions ask everyone to stay calm. Treating antisemitism as PR is an abdication of responsibility—of Western governments, of Jewish organizations, and of Israel’s government. Exposure works (slowly) when it is persistent—naming names, freezing visas, conditioning funds. Of course, this remains a volume business: Israel argues facts; adversaries mass-produce footnotes. But we must work on it. Giving up (or just maintaining the status quo) will unfortunately produce a higher body count. This is two-tier enforcement in action—speech indulgence for one camp, barricades for Jews.

Somaliland, India, And The Periphery

Israel’s recognition of Somaliland continued to reorder the Horn of Africa, securing a friendly node on the Gulf of Aden and tightening pressure on Houthi leverage. The backlash—Somalia, Egypt, Turkey, Iran—telegraphed anxiety more than principle. Cairo’s sudden “debt-for-displacement” denial read as domestic narrative management amid declining Red Sea influence.

Saudi Arabia signaled a more ambivalent (and bad-for-Israel) regional posture, drifting toward Qatar and Turkey while distancing from UAE-led moderation—complicating normalization math without stopping quiet coordination. Meanwhile, India approved major new procurements of Israeli precision munitions, deepening a defense partnership that already anchors a third of Israel’s exports. Additionally, tourism ticked upward—1.3 million visitors to Israel in 2025, high satisfaction rates, and expectations of recovery in 2026—an unglamorous but real vote of confidence.

ASSESSMENT

Geography still beats press releases. Somaliland recognition shows chokepoints don’t care about consensus statements. India shows capability partnerships outlast mood swings. Tourism matters because people don’t book flights to countries they think are finished—though it feels like most of that 1.3M are currently here (based on crowds and traffic). Israel is rebuilding strategic depth while others argue about optics.

Briefly Noted**Frontline & Security**

- **Turkey Counterterrorism:** Turkey arrested 357 ISIS suspects in raids across 21 provinces after a firefight that killed three police officers and six ISIS operatives, amid warnings of planned holiday attacks. Ankara’s “counterterrorism” optics keep doubling as regime hygiene—useful PR at home, and a reminder that Turkey remains a churn zone for jihadist networks it swears it has under control.

Diplomacy & Geopolitics

- **Iran Unrest:** Crown Prince Reza Pahlavi called for nationwide strikes as Iran’s protests entered their fourth day, with bazaar shutdowns and regime warnings against “hijacked” unrest.

- **Iran Escalation:** Protesters in Hamedan torched an IRGC headquarters as unrest intensified, with one Basij member reported killed and multiple security personnel injured.

Culture, Religion & Society

- **UK Philanthropist Action:** UK philanthropist Sigrid Rausing cut funding to organizations she says offered apologetics for October 7 and trafficked in anti-Zionist slogans. When donors finally price “human rights” cosplay that launders terror, the activist ecosystem discovers accountability exists—right after it loses the grant. Hopefully more philanthropists follow suit.
- **Antisemitic Incident:** A Jewish camp leader and a child were reportedly kicked out of an Uber on a country road at 3 a.m. after the driver initiated a conversation about Judaism and Israel. This is diaspora reality in miniature: Jews are expected to be quiet, grateful, and invisible—until the ride ends and the road gets dark.
- **Security Restrictions:** Multiple major cities canceled or restricted New Year’s Eve events over security concerns tied to terror threats and crowd-risk warnings. When public celebration becomes a liability, the state has already ceded deterrence—because jihadists now get to set the calendar.

Economy, Tech & Infrastructure

- **Turkey-Syria Banking:** Turkey’s state lender Ziraat said it is working with Syria’s central bank to launch operations and deepen correspondent banking links as Ankara embeds itself in Syrian reconstruction. “Stabilization” is Ankara’s favorite word for building leverage, and banking infrastructure is a clean way to turn patronage into permanence.

Developments to Watch

Northern Front (Lebanon / Syria)

- **Hezbollah Deadline Meets Reality** — The U.S. deadline for Lebanese disarmament expires as the violation/enforcement gap keeps yawning (2,024 vs. 593), and Israeli security leadership openly preps for days of fighting. **LIKELY TO ESCALATE**
- **Turkey’s Radar Tax Advances** — Reporting continues that Ankara is pushing radar deployments on Syrian soil to monitor Israeli air activity. Once switched on, it narrows Israel’s margin for preemption without firing a shot.
- **Russian Lift To Iran Accelerates** — Four Russian military cargo planes landed in Iran within the 24 hours or so, an unusually dense airbridge. Logistics volume is intent; Moscow doesn’t fly this often to get Delta status.

Gaza & Southern Theater

- **Rafah First, Phase II Later** — Israeli and U.S. tracks align on beginning limited reconstruction in Rafah only after the return of the last fallen hostage, with reopening pressure building on the crossing.
- **Beit Hanoun Launcher Find** — IDF forces uncovered a loaded rocket launcher near the Yellow Line, ready for immediate fire. Demilitarization without seizures is a fairy tale told to donors.
- **Hamas Leadership Knife Fight** — Hamas is days from naming a political bureau chief (Mashal vs. al-Hayya) amid open smear campaigns and Gaza-side resentment. Terror organization internal strife doesn't moderate actions, it leads to shows of force.

Regional Axis (Iran, Houthis, Militias)

- **Iran Street Unrest Deepens** — Gunfire near a police station in Hamedan and clashes around Karaj mark a fourth day of protests, alongside regime cyberattack claims and the use of lethal force against protestors. Cornered dictators don't calm down. **LIKELY TO ESCALATE**
- **Missile Rebuild Warnings** — Israeli leadership publicly flagged Iranian ballistic drills and nuclear rebuild attempts while Washington withheld timelines. Conditional deterrence invites threshold-testing, not restraint.
- **Red Sea Threat Signaling** — Houthis reiterated threats against any Israeli presence near Somaliland as recognition dominoes wobble.

Diplomatic & Legal

- **Turkey Veto Line Hardens** — Israel is preparing a firm veto against any Turkish role in Gaza enforcement as Ankara lobbies Washington.
- **Belgium ICJ Momentum** — Belgium's entry into the ICJ case is prompting copycat lawfare framed as "procedural." Expect paperwork pressure to spike precisely as enforcement tightens.

Home Front & Politics

- **Negev Retaliation Loop** — Vehicle arson in Lehavim triggered a police/Shin Bet surge around Tarabin al-Sana, with ministers promising crush-mode enforcement.
- **Draft Crisis Collision** — The High Court freeze on unsupervised yeshiva funding collides with marathon draft-law sessions next week. Manpower math is about to meet coalition reality, and neither side can kick the can much farther.
- **Cyber Nuisance Rehearsal** — Iran-linked SMS and infrastructure disruptions hit Israel earlier this week (much to my chagrin, as my phone went dark) as Tehran claims its own networks were attacked.

Closing Statement

SADLY, 2023 bleeds into 2026. Hamas won't disarm itself. Hezbollah won't evaporate because a deadline passed. Tehran won't become reasonable because its currency collapses.

That said, our hope is that 2026 will bring fewer funerals, fewer committees, and more consequences. May our remaining hostage be returned. May our soldiers come home alive. May our leaders remember that sovereignty is a duty. And may the enemies of Israel discover—again—that Jewish strength will always beat their slogans.

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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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