



Forensic intelligence for those who act.

READER EDITION

January 22, 2026

ISRAEL BRIEF

Thursday, January 22

Verification stalls as strike-enabling capacity arrives. Davos signs paper while Iran keeps the ledger unreadable.

◇ URIEL ZEHAVI

THE BOTTOM LINE Davos *is* useful for one thing at least. Seeing who can do deals without pretending process is power. Israel should keep building the alliance stack that runs on mutual capability—energy, tech, defense integration, and supply chains—because that’s where “pressure” stops being free. Europe’s IRGC paralysis is a sad punchline. The same capitals that moralize about Israel cannot even label the IRGC a terror organization—because naming it would force action against money, visas, front groups, and networks embedded inside Europe’s own systems.

CLASSIFICATION

Reader Edition

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WASHINGTON is moving the infrastructure that makes “decisive” real. Tehran tries to turn uncertainty into protection. As if the massacre of Iran’s own civilians isn’t enough reason to step in... or their jihadi tendencies, the IAEA access gap is the mechanism that lets Iran keep a nuclear inventory off-balance-sheet while everyone argues about “process.” Israel is widening enforcement in Lebanon and tightening internal sovereignty levers in Jerusalem.

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Flash Brief

- **Iran:** U.S. tankers surge east; USS Abraham Lincoln nears reach; air defenses queue.
- **IAEA Ledger:** Inspectors lack access to Natanz, Fordow, Isfahan; 60%-enriched stockpile lacks accounting.
- **Iran Interior:** Internet blackout roughly two weeks; detentions expand; defections surface; regime monetizes bodies and paperwork.
- **Lebanon Corridor:** IDF warns civilians, strikes depots and border crossings, removes liaison officer and smuggler.
- **Gaza Line:** Breach attempts and drone teams draw fire; Washington sets disarm deadlines; propaganda rebrands operators.
- **Judea & Samaria:** Bomb-maker detained near Tulkarem; drones carry machine gun and firearms across borders.
- **Jerusalem:** Temple Mount entry rules shift; UNRWA demolition reaches court; PA-trained teacher ban passes.

The War Today

IAEA Clock Tightens As U.S. Options Expand Around Iran

Rhetoric shifts into force geometry as Washington continues refining “decisive” options without yet ordering strikes. The USS *Abraham Lincoln* carrier strike group heads toward the region with expected strike range by tomorrow. F-15E Strike Eagles staged forward (including into Jordan). Additional Patriot and THAAD air-and-missile defenses were queued for deployment to blunt retaliation against U.S. bases and partners. Large waves of U.S. aerial refueling assets are coming into position (multiple KC-135R and KC-46A tankers routing toward Europe and the Middle East), alongside sustained strategic airlift tempo into regional hubs, while Washington’s messaging stayed (deliberately?) inconsistent. At Davos Trump said Iran ‘wants to talk’ and ‘we will talk’ even as he refused to rule out strikes—diplomacy as a delay valve, force posture as the real language. Tehran’s foreign minister warned that a renewed U.S. attack would trigger response “with all our capabilities,” framing any move against the Supreme Leader as all-out war. If Tehran concludes a U.S. attack is inevitable, it may try to seize initiative with a preemptive strike, betting that surprise is its only remaining advantage. Israel’s carriers began rehearsing contingency plans—prepared plans to evacuate fleets out of Ben Gurion if needed—because runways and parked aircraft are soft targets when deterrence turns into ‘surprise.’ In parallel, the nuclear oversight problem re-entered the foreground: the IAEA said it still cannot access three bombed sites (Natanz, Fordow, Isfahan) and warned it cannot indefinitely accept uncertainty over what happened to the stockpile of highly enriched

uranium (including roughly 440.9 kg enriched to roughly at least 60%). Europe, meanwhile, managed to do what Europe does best: block IRGC terrorist designation even while insisting it understands the threat.

ASSESSMENT

Washington is stacking tankers, carriers, air defenses, and transport capacity because “decisive” only counts if the first week doesn’t turn into a base-defense panic drill. Tehran is trying to inflate retaliation risk, muddy the negotiation channel, and hide the nuclear inventory long enough to make every option feel expensive. The IAEA inspectors can’t see the bombed sites and can’t account for 60%-enriched material, so Tehran gets ambiguity as a shield and diplomacy becomes a delay mechanism dressed as prudence. Europe’s refusal to designate the IRGC is permission—financial nodes stay open, travel lanes stay open, front groups keep operating while European politicians congratulate themselves for “de-escalating.” Either the U.S. defines an end-state or the region drifts into the worst option—half-strikes, maximal Iranian vengeance, and the nuclear question that disappears into the fog.

Violence and Defections Spread; IRGC Grips Harder And Looks Outward

Inside Iran, the regime escalated from crackdown into isolation architecture: internet disruption passed the 300-hour mark as authorities cut social platforms and blocked phone lines, tightened movement controls with IRGC presence at major city entry points, and moved to physically remove satellite dishes—closing off the last civilian escape valve for outside information. The blackout coincided with further widening violence and coercion mechanics aimed at controlling the narrative of the dead: families were reportedly pressured to sign false statements claiming killed relatives were Basij members (or were killed by “protesters”/other causes), with signatures sometimes tied to payments and body return; other cases described demands for enormous sums to recover bodies. Detentions expanded sharply in Kurdish areas, with thousands reportedly held, hundreds unaccounted for, and many minors among the missing. All while medical spaces are treated as traps—security forces positioned inside and around hospitals to detained wounded protesters (and those that would treat them). Hundreds of junior and mid-level IRGC/Basij officers allegedly defected, security personnel in at least one area were reportedly detained for refusing to fire, and the regime’s own messaging betrayed fear—public warnings about “desertion/disobedience” appearing and then being scrubbed. Political and diplomatic defections also surfaced, including a senior mission official abroad seeking asylum and other quiet outreach by Iranian diplomats to European authorities.

ASSESSMENT

The regime’s most honest language is its procedure: isolate, detain, torture, falsify paperwork, and monetize corpses. That is a mafia-state. Defections are the real fault line—hence Khamenei’s reliance on the IRGC to run repression, and the nervous messaging about “abandonment.” A regime that feels brittle looks outward for distraction. Israel should assume the IRGC will try to prove it can widen the map on command—especially against soft targets and diaspora nodes—while simultaneously hardening disruption of IRGC networks, travel, and money transfers that keep the repression machine funded and the escape hatches open.

Israel Widens Lebanon Enforcement From Depots To Smuggling Crossings

Israel escalated ceasefire enforcement across southern Lebanon and the Syria–Lebanon seam, pairing advance civilian-area evacuation warnings with a strike wave on Hezbollah weapons depots and an underground storage site in multiple towns (including Qennarit and Kfour), then expanding northward to hit four land crossings in the Hermel region assessed as Hezbollah’s weapons-transfer routes. Israel also conducted targeted removals of key enablers: a Hezbollah “liaison officer” (Abu Ali Salameh) linked to embedding infrastructure inside civilian properties in Yanouh near Tyre and to an episode in which Hezbollah allegedly used a staged “crowd” and rear-door extraction to empty a weapons site before Lebanese Army documentation; and a “key” Hezbollah weapons smuggler (Mohammad Awasha/Awatsheh) struck near the Sidon district, described as running transfers via a front company sourcing prohibited goods from multiple countries and directing smugglers moving weapons from Iraq to Syria and Lebanon. Separately, Turkey reportedly deployed an HTRS-100 radar at Damascus International Airport—an attempt to price Israeli freedom of action in Syrian airspace (*especially vis-a-vis Iran*) with Turkish ‘air-defense bureaucracy.’ Israel’s response to that stayed in the political lane for now: entry bans on 29 senior Turkish figures, including Bilal Erdogan.

ASSESSMENT

The most revealing detail is the choreography Israel attributes to Yanouh—boxes out the back door, paperwork out the front, and then a camera tour of an “empty” site so everyone can claim progress. That is Lebanese “sovereignty” in [lack of] action. If the Lebanese state cannot—or will not—seize and dismantle, then enforcement becomes Israel’s permanent job, and every intermediary who makes Hezbollah’s logistics look normal becomes a targetable military function.

Deadlines From Davos Collide With Hamas Friction And Field Reality

Along the Gaza envelope, the field pattern keeps contradicting the “post-war governance” they talk about. Reserve forces operating the buffer zone described near-daily engagements against probes and suspicious targets, continued tunnel and weapons discovery, and a rapid-response strike cycle after the Rafah–Khan Younis breach. Overnight, a terror operative crossed the separation line in the southern Strip and approached IDF forces in a threatening manner and was eliminated. In central Gaza, several Hamas suspects operating a drone were assessed as an immediate threat to troops and were struck after identification. Palestinian reporting claimed those killed were “photo-journalists” tied to an Egyptian governmental humanitarian body—a characterization *not* matched by the military’s description of the activity. Press passes are not licenses to terror. Washington tried to impose a timetable. Trump publicly warned that Hamas must give up weapons quickly—“two or three days” or “at most” a few weeks—threatening destruction if disarmament does not occur, as a U.S.-backed governance architecture advanced around a Palestinian “technocratic” body headed by Ali Sha’ath to restore services. Bibi accepted an invitation to sit on the Board of Peace as Davos

advanced it forward. “Process” in name only. Trump declared the Board formally ratified, claimed 59 countries are involved, said Putin agreed to join, and—usefully—tied ‘progress’ to Hamas releasing the last hostage.

ASSESSMENT

We’ve seen this before. The West declares the war over on paper, then acts surprised when the war refuses to read the charter. Buffer-zone commanders are describing a contact environment—probing, cameras, drones, tunnel work, rapid strikes—because Hamas is still doing what intact terror movements do. Davos deadlines are theater (and inexplicably worse than Oh, Mary!) unless someone is physically removing rifles, dismantling command structures, and making the cost of “noncompliance” immediate and personal. If Israel is going to sit on the Board, it should treat the seat as an intelligence and veto platform, not as consent to the illusion that committees disarm jihadists.

Counterterror Disrupts Bomb-Making And Drone Gun Pipelines

In Judea and Samaria, security forces detained a senior explosives manufacturer near Tulkarem. Undercover Border Police, led by the Ephraim Brigade and guided by the internal security service, entered Shuweika, surrounded the suspect’s family home, and arrested Fadi Bahati—a central bomb maker in the Tulkarem terror network—without reported casualties, transferring him for interrogation. Further weapons inflow attempts continued to shift into the air. Security forces downed a drone crossing from Egypt carrying an FN MAG machine gun after detection by an air-control array. Another drone crossing “from the east” was intercepted carrying ten firearms. Inside the raid force itself, the system publicly disciplined an elite unit after a near friendly-fire incident during a January 11 arrest operation in Nablus: a navigation error brought one team into a neighboring sector, misidentification followed, gunfire was opened toward a structure, and multiple commanders were removed or formally censured despite no injuries—an explicit acknowledgment that even successful raids carries a compounding risk of internal error.

ASSESSMENT

Terror capability isn’t only the shooter—it’s the bomb-maker, the smuggling engineer, and the procurement lane that keeps the workshop supplied. The arrest of a central explosives manufacturer is meaningful precisely because it hits the production node—fewer devices on the arteries means fewer “surprise” roadside incidents later. But the Duvdevan near-miss is the other side of the ledger: high-frequency raids grind down certainty, and one navigation error can turn into self-inflicted chaos.

Inside Israel

Israel Pushes Sovereignty in Jerusalem, Court Tries to Slow It

Police updated Temple Mount entry rules to allow Jewish visitors to bring approved prayer sheets—distributed at the entrance and limited to designated formats—after years in which any prayer materials were barred and quiet

prayer could trigger removal or arrest. Heavy engineering began demolishing structures at UNRWA's former Ammunition Hill complex under the new legal framework ending the agency's operations in Israel, while UNRWA filed an urgent High Court petition seeking an interim order to halt evictions, demolitions, and infrastructure disconnections at its Jerusalem sites. The court ordered a state response and set a main hearing for February 2. The father of Yonatan Samerano—abducted and murdered on October 7 by an UNRWA employee—affixed a mezuzah at the site in a public act of closure attended by municipal and Knesset figures. Separately, the Knesset passed a law in second and third readings barring graduates of Palestinian Authority academic institutions from employment as teachers, principals, or supervisors in Israel's education system, explicitly framing PA training as incitement-laced and pointing to large numbers of PA-trained staff in Jerusalem's schools.

ASSESSMENT

UNRWA's petition is not really about sanitation services. It is about freezing "facts on the ground" long enough for foreign governments and NGOs to reassert the old immunity model—UN flags as force fields, "pending review" as permanent paralysis. The High Court is being baited into playing national risk-manager again. Restrain the executive and get praised abroad while the state absorbs the operational mess; don't restrain it and get cast as complicit in "unprecedented harm." Meanwhile, the Temple Mount adjustment is incremental, predictable, and yet still combustible—one more step away from a policy of "Jewish prayer is contraband," one more invitation for international pressure to price Jewish rights as a regional destabilizer. And the teacher-credential law is the same logic applied to the classroom: Israel will stop funding and staffing its own institutions with cadres trained under a hostile authority's ideological pipeline.

"Ultra-Orthodox Rabbis" Say "No One Will Enlist" as Draft Bill Crawls Forward

Recordings of senior Haredi rabbis backing the proposed conscription law describe it as a time-buying maneuver with no plan to meet enlistment targets—rejecting enlistment even for those outside full-time yeshiva frameworks and predicting the law will collapse after a few years—while the bill itself remains politically unstable despite Netanyahu's backing. The legislation is expected to advance out of committee yet faces an uphill path to final votes due to coalition rebels (Religious Zionism's ambiguity, and UTJ's internal split between factions willing to tolerate sanctions in theory and factions rejecting any sanctions at all). The coalition's margin is thin enough that a small handful of defections can kill it. This standoff sits on top of the budget calendar: the 2026 budget must clear readings by the end of March or the Knesset dissolves. Haredi parties are explicitly tying budget support to passage of an exemptions-heavy draft framework even as senior figures privately signal they expect exemptions to remain the real outcome.

ASSESSMENT

Israel cannot manufacture a reserve force out of thin air, and it cannot deter physics with coalition theatrics. The Haredi leadership's recorded candor strips the costume off the bill. "Targets" as decoration, enforcement as a rumor, time-buying as strategy— a national security fraud. The budget deadline turns this into hostage-taking. Talk about a chillul hashem.

Israel and the World

Anti-Israel Procedure Across Canada, Britain, U.S. Campuses

A Canadian parliamentary petition now pushes its federal government to scrutinize citizens and residents with Israel Defense Forces service, as another MP urges border screening of incoming travelers with IDF backgrounds—an escalation that rides atop an existing ecosystem of public “databases” doxxing hundreds of people and an expanding theory that “war-crimes vetting” should be routine at the border. In Britain, a major teachers’ union’s materials steer pupils toward “understanding” Hamas and testing “fight back” fantasies in Gaza—while framing Israel through apartheid/genocide tropes and erasing Israeli hostages—political grooming packaged as pedagogy. In the United States, a public university is hosting a full-day “Palestine” advocacy conference featuring activists tied to disruptive campus actions (including a prior building takeover that caused major damage), alongside a screening pitched around “crackdowns” on divestment activism. Ireland is home to new polling that shows widespread Holocaust ignorance and a meaningful chunk of the public embracing denial/exaggeration claims—an education gap in a country already loud in its anti-Israel posture.

ASSESSMENT

Doxx, petition, vet, detain, “train,” “guide,” and “sensitize,” then pretend it’s neutral governance. Great. It’s clear that the point is not to win a legal case but to make ordinary Jewish life feel like a controlled substance. The teacher-union lesson-plan genre is the most corrosive because it inoculates children against moral clarity before they can spell it: “understand Hamas,” erase hostages, and call it empathy. Gross. Canada’s petition-and-border theater is the clean procedural version of the same instinct—create fear without needing convictions.

Davos Exposes Europe’s Split: Tech Ties Grow, Iran Labels Stall

At Davos, Israel’s President Herzog worked the bilateral lanes that actually move—meetings with Azerbaijan and Switzerland focused on deepening trade, innovation, and technology cooperation, alongside engagement with a major U.S. chip-and-AI firm on its planned northern Israel campus and the return of an employee previously held in Gaza. In parallel, Israel’s leadership is pushing back against the normalization of international-legal exclusion: the ICC warrant cloud is being used as a practical tool to freeze senior Israelis out of global forums and treat that as “good governance,” not political warfare. Beyond the “Peace Council” we talked about earlier, several of Europe’s

governments blocked a move to designate the IRGC as a terrorist organization, despite the regime's external operations, hostage-taking networks, and escalating threats—Europe unwilling to name the arsonist while insisting it should supervise the fire code.

ASSESSMENT

Davos is useful for one thing at least. Seeing who can do deals without pretending process is power. Israel should keep building the alliance stack that runs on mutual capability—energy, tech, defense integration, and supply chains—because that's where "pressure" stops being free. Europe's IRGC paralysis is a sad punchline. The same capitals that moralize about Israel cannot even label the IRGC a terror organization—because naming it would force action against money, visas, front groups, and networks embedded inside Europe's own systems.

Briefly Noted

Diplomacy & Geopolitics

- **JNS:** Palestinian Authority chief Mahmoud Abbas is slated to meet Vladimir Putin in Moscow on Thursday. The PA keeps shopping itself to the anti-West axis while Europe pretends it's hosting a Nobel nominee, not a regime that pays terrorists per Jew they slaughter.
- **JNS:** The U.S. Treasury sanctioned six Gaza-based "charities," a diaspora umbrella group, and a UK-based official for supporting Hamas's Qassam Brigades. Bad news for Hamas fundraising, and for anyone still laundering their politics through "civil society."
- **Algemeiner:** The PA publicly reaffirmed support for China's "One China" policy—including Taiwan—as Beijing ramped up military pressure and blockade-style drills. Clearly, this should be interpreted as being a friend of the Davos-linked West. Or not.
- **Jerusalem Post:** Trump's Syria posture is becoming a test of whether accommodating Erdogan buys stability or buys Erdogan. A warning that "NATO ally" can still be a hostile power broker if Washington keeps buying its Middle East policy folders from Ankara.

Economy, Tech & Infrastructure

- **Globes:** Israel's push to become a key junction for Europe-Asia submarine fiber routes is slipping, with projects delayed or frozen by Red Sea risk, Saudi reluctance, Turkish interference, and Israeli internal bureaucratic sabotage. With three near-capacity cables and growing traffic, this is a strategic choke point: a modern blockade can be done with anchors, drones, and paperwork.

Domestic & Law

- **The Jewish Chronicle:** An Iraqi-Jewish family is suing in Paris, alleging France has used their looted Baghdad home as an embassy residence since

1964 without paying rent. Let's see whether "civilized" states will ever treat Jewish property theft in the Arab world as restitution-worthy—or as a charming diplomatic footnote.

Developments to Watch

Judea & Samaria

- **Tulkarem bomb-factory node rolled up** — Border Police/Shin Bet detained Fadi Bahati, tagged as a central explosives manufacturer.
- **Drone guns jump the fence** — IDF downed a drone from Egypt carrying an FN MAG; another drone from the east carried ten firearms. Expect heavier payload experiments and multi-drone nights.

Northern Front (Lebanon / Syria)

- **Hermel seam interdicted, again** — IAF struck four Syria–Lebanon land crossings assessed as Hezbollah weapons-transfer routes. Watch for Hezbollah to reroute through smaller tracks and for Israel to keep burning the corridor until the smugglers quit.
- **Turkey Radar Goes Up in Damascus** — Ankara's HTRS-100 deployment at Damascus airport is an attempt to limit IAF operating room with 'defensive' hardware.
- **Logistics enablers moved to target list** — Multiple removals near Sidon/Tyre plus strikes on depots and underground storage signal Israel is hunting the procurement and liaison layer, not just launch crews. Hezbollah's incentive is to stage a "deterrence restore" incident to end the precedent.
- **ISIS detainees get moved off-board** — CENTCOM confirmed a mission transferring ISIS detainees from northeastern Syria to Iraq. That reads like custody anxiety. Transfers and vacuums breed jailbreaks, turf grabs, and "counter-ISIS" cover for hostile repositioning near Israel's north. **LIKELY TO ESCALATE**

Gaza & Southern Theater

- **Drone teams become "press shields"** — IDF struck suspects operating a Hamas drone. Palestinian reporting instantly branded them "photojournalists" tied to an Egyptian humanitarian body.
- **Yellow Line breaches normalize under ceasefire** — A Gazan operative crossed the Yellow Line and approached 188th Brigade troops and was eliminated as an immediate threat.

Regional Axis (Iran, Houthis, Militias)

- **Preemption Logic Hardens** — Israeli assessments are now concluding that Tehran is likely to fire first if it concludes a U.S. strike is inevitable. **LIKELY TO ESCALATE**

Diplomatic & Legal

- **Board of Peace Becomes a Constraint Machine** — Davos ratified the Board and Trump is claiming 59 states (including Putin's Russian Federation), while tying 'progress' to Hamas releasing the last hostage.

Home Front & Politics

- **Controlled blasts, uncontrolled rumor** — MOCA mine/UXO clearance Thursday near Jordan Valley communities will produce booms and smoke.
- **Ben Gurion Aircraft Evacuation Planning** — Israel's airlines are rehearsing plans to move fleets out of Ben Gurion if instructed, refined from prior Iran escalations. If planes start moving, treat it as expectation management.

Davos can ratify councils, but it cannot account for uranium, disarm Hamas, or stop Hezbollah logistics unless someone makes those facts costly. The next few days are about three tests: whether U.S. protection layers finish arriving before Tehran tries distraction fire. Whether Israel's Lebanon strikes force Hezbollah to attempt a "restore credibility" incident. Whether the Board-of-Peace charter gets used as a constraint tool against Israeli freedom of action while rifles remain untouched.

— *Uri Zehavi · Intelligence Editor*

With Modi Zehavi · Data + Research Analyst

PS: Today's Dossier (8:30am ET) is about the unglamorous stuff that decides outcomes. Desalination. Diesel reserves. Cyber continuity. And what dependency *really* looks like.

Give this to the friend who thinks a Davos charter can find 440.9 kg of 60%+ uranium.

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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