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READER EDITION

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ISRAEL BRIEF

Monday, January 26

Rafah turns from leverage into farce. Israel is burning Hezbollah's rebuild machinery and watching proxies advertise "martyrdom" like it's a product launch.

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THE BOTTOM LINE Israel should stop treating Saudi Arabia like a romantic prospect and start treating it like a state that wants U.S. protection, regional leverage, and zero price tags—then reaches for anti-Zionist populism when its modernization story hits a wall. When Riyadh's domestic transformation stalls, Islamism becomes the quickest external influence tool, and Israel becomes the easiest punching bag to prove piety without solving anything. The UAE lane looks more serious precisely because it's built on capability, commerce, and shared threat recognition rather than sermon-grade theatrics. The Azerbaijan/Kazakhstan track is the same principle: lock Israel into supply chains and mutual economic interests so "pressure" becomes expensive for everyone else. In short: build with the builders and price the hedgers. The region does not reward good intentions. It rewards strength and leverage.

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GAZA is still being “managed” through paperwork while Hamas decides whether an Israeli family buries its dead. Unfortunately, it seems we haven’t learned our lessons yet. Up north, Israel keeps treating Hezbollah’s factories as fair game, because Lebanon’s “sovereignty” remains a decorative concept. In the background, the U.S. finishes defensive deployments and moves high-end systems while everyone pretends to know exactly which way Trump will decide to go.

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Flash Brief

- **Rafah:** IDF searches Gaza cemetery for Ran Gvili as cabinet sets “conditions” for crossing. *See The War Today.*
- **Lebanon:** IAF strikes Hezbollah production sites; IDF reports killing artillery chief and another operative near Tyre. *See The War Today.*
- **Iran Window:** USS Abraham Lincoln operates near Iran as U.S. air defenses and THAAD movements continue. *See Bridge Section.*
- **Proxy Threats:** Houthis warn U.S. cargo ships; Hezbollah calls for fighters and “martyrdom” operations. *See Developments to Watch.*
- **Budget–Draft:** Knesset advances 2026 budget first reading as draft bill moves and coalition math tightens. *See Inside Israel.*
- **Diaspora:** Canadian complaints target IDF-linked Jews as Barcelona cemetery vandalism follows mapping and incitement. *See Israel and the World.*

Below: Gaza leverage mechanics, northern strike logic, Iran escalation pathways, budget–draft pressure, and diaspora targeting.

ISRAEL is again asked to trade control for optics. It gives in. And then inevitably it will get blamed when optics fail basic physics. The Iran question isn’t “are systems arriving”—they are—it’s whether the region gets a decision or an endless rehearsal while proxies take their shot anyway. And in Gaza, the hostage issue is being used as the world’s most grotesque compliance test: dig the graves, check the box, open the gate.

The War Today

Hostage Search Becomes A Box–Check For Reopening Rafah

Israel’s security cabinet convened to discuss the Rafah crossing as the IDF launched an intensive recovery operation to locate Staff Sgt. Ran Gvili’s¹—opening graves in a cemetery in northern Gaza based on sharpened intelligence and information relayed via mediators. Forensic teams are working the site, and by morning more than 200 graves had reportedly been opened with no findings announced yet. Under President Trump’s 20-point framework, the Prime Minister’s Office stated Israel has agreed to open Rafah in limited capacity for people only under full Israeli supervision, conditioned on the return of all living hostages and Hamas making a “100% effort” to locate and return all fallen—yet the same statement adds Rafah will open once the current operation concludes even if the remains are not found, with Israel effectively acknowledging Hamas made “a certain degree of effort” regardless. The emerging mechanics reportedly place ID checks at the exit

stage in EU hands with PA personnel pre-approved by Israel—Israeli oversight conducted remotely with no Israeli personnel physically at the crossing—and identities pre-cleared on security assessments. While a separate Israeli-controlled inspection point is described for entry flows to limit smuggling and stop flagged individuals. Ran Gvili's family publicly appealed to ministers not to concede on Rafah before all hostages are returned, warning against being deceived by staged cooperation.

ASSESSMENT

Israel is quietly agreeing to treat Hamas "effort" as good enough even if the body stays underground. The field reality is gruesome and simple. Hamas still controls whether an Israeli family buries its dead, and the world still wants a ribbon-cutting schedule. Swapping Israeli control for an EU badge and a PA stamp is not "security oversight"—it's providing a pathway to more terror. If the Yellow Line is being built into a durable contact border, Rafah is the pressure valve that keeps Gaza's external arteries conditional; opening it because the US adds an entry to your calendar teaches Hamas a terrible lesson: delay long enough, and the adults will give up and declare the problem "managed."

Missile Defense Finishes Arriving; Proxies Warm Up Their Scripts

The IDF widened enforcement in Lebanon in response to repeated cease-fire violations, striking Hezbollah weapons-production and infrastructure—including a weapons manufacturing site in the Bir al-Sansal area and additional military infrastructure in the Beqaa. Later reporting indicates broader strikes on weapon storage facilities, military infrastructure, and a structure inside a base used by Hezbollah's Radwan Force to advance attacks. The IDF also reported eliminating Muhammad al-Husseini in the Bazouriyeh area near Tyre—described as Hezbollah's artillery chief in Arzoun who had been working to restore rocket capabilities in southern Lebanon—and killing an additional operative (Jawad Basma) tied to the Bir al-Sansal weapons-manufacturing site as strikes reportedly used bunker-busting munitions in parts of the south.

Against this northern enforcement backdrop, the regional defense picture tightened. U.S. posture continues to emphasize air and missile defense reinforcement across key partners (including Saudi Arabia, Bahrain, and the UAE), with heavy airlift delivering air-defense systems to Prince Sultan Air Base and additional defensive reinforcements still expected. Israeli and U.S. defensive deployments supporting Israel were described as completed, with further land-based reinforcement preparations continuing. Electronic-warfare capacity is also repositioning, and a large regional air exercise is planned. Civil aviation is being managed like a warning light. Iran has restricted low-altitude civilian flying nationwide for three months. Israel's airlines have eased cancellation terms. Israel's Civil Aviation Authority warned foreign carriers of a "sensitive period" later in the week with contingency priority rules if airspace closes. Operationally, senior IDF leadership emphasized there are no indications of imminent strikes on Iran and that timing depends on President Trump's decision—but the surrounding map is already issuing its threats. The Houthis declared American cargo ships legitimate targets if the U.S. strikes Iran, and Iran-aligned Iraqi militia leadership publicly called for readiness

up to “martyrdom operations” in defense of Tehran. Israeli reporting also describes Jerusalem urging that any U.S. strike package include Iranian government/military sites and ground-to-ground missile systems, alongside reports of internal divisions among U.S. and regional actors over a direct attack.

ASSESSMENT

Israel is keeping Hezbollah’s “rebuild” at the forefront. Meanwhile, the region is in the awkward phase where defenses finish arriving and everyone pretends that means strategy has been decided. It hasn’t. Trump is debating whether to act while buying insurance so the debate doesn’t get interrupted by a missile salvo. Proxies aren’t waiting for the memo, though. They’re already warming up their talking points about “holy war” and “shipping targets,” because Iran’s deterrence machine runs on distributed escalation. Iran’s three-month low-altitude aviation clampdown indicates tighter internal control and a cleaner sky are useful whether you fear unrest, anticipate strikes, or both.

Inside Israel

Budget Clock Squeezes Draft Deal as Government Tries to Unchain Itself

The Knesset is bringing the 2026 budget to a first reading Monday. The package sets spending at NIS 662 billion (excluding debt service), a deficit ceiling of 3.9% of GDP, and hikes defense to NIS 112 billion—because wars are expensive and so is pretending exemptions are “tradition.” The vote is fused to the ultra-Orthodox conscription standoff: the draft bill is entering its final committee stretch this week ahead of a first-reading plenum vote, with the Foreign Affairs and Defense Committee’s legal counsel expected to back it subject to wording changes. Coalition opponents insist they have the votes to defeat it. There’s more than a little time pressure here as the budget needs roughly two months from tabling to final passage—pushing the coalition toward a March 25 finish line with Passover on April 1—meaning the “automatic dissolution” guillotine is basically a scheduling conflict. Inside that same pressure cooker, the IDF promoted the commander who founded the Haredi-tailored Hashmonaim Brigade, Col. Avinoam Emunah, into the Chief of Staff’s top adviser on Haredi integration—an institutional signal that the army is preparing for long-term friction, not a one-season coalition patch.

Meanwhile the attorney-general is warning that proposed changes to cabinet procedures would make core legal constraints effectively optional—allowing ministers to advance decisions and legislation without written legal opinions and treating legal review as a suggestion box. Her deputy argues the proposal lacks professional groundwork, collides with High Court doctrine that the AG’s opinion binds the government (unless a court rules otherwise,) and looks abusive heading toward an election period. And because nothing says “healthy governance” like litigating personnel rank in open court, the Jerusalem District Court heard a petition over National Security Minister Itamar Ben-Gvir’s refusal to approve the promotion of senior investigations officer Rinat Saban—who completed the required course in April 2025 and was

the only graduate denied the rank on the eve of the ceremony. Ben-Gvir told the court he is “not a rubber stamp,” cited procedural concerns (evaluation score, appointment mechanics, irregularities in materials), denied any link to Netanyahu-related testimony, and claimed pressure from figures close to the AG.

ASSESSMENT

The budget/draft linkage is coalition politics at its most honest. The state needs bodies. Haredi parties need exemptions. So, the bill becomes a hostage note written in legislative Hebrew and paid for by the people already serving. The cabinet-procedure fight is the deeper story: the legal establishment is acting like removing binding legal review is an invitation to criminality. The government is acting like binding legal review has become a veto regime in a constitutional vacuum. Both can be true, and yet neither is a governance plan. The Ben-Gvir/Saban hearing is the microcosm: one side calls it “independence of investigators,” the other calls it “ministerial oversight,” and the public gets the same product either way—institutions fighting over who controls the state while criminal networks, draft evasion, and war strain keep charging interest.

Negev Settlements Move From Talk to Map

Netanyahu announced the establishment of five new towns in the Negev and proposed naming one “Rananim” after Master Sgt. Ran Gvili ז”ל—while the government advances an employment zone and settlement line along Route 25 between Beersheva and Dimona and the Beersheva–Arad axis. It is explicitly framed as demographic strengthening, housing expansions, and reinforcing governance. Ministers described the corridor as visibly dominated by illegal Bedouin construction and argued that small communities are a sovereignty tool that can be expedited by legislation shortening the timeline for establishing new localities. The naming move lands as the state continues an operation to locate and recover Ran Gvili’s remains for burial.

ASSESSMENT

The Negev towns push is what real sovereignty looks like when it’s not auditioning for international applause: land you can control and administrative speed that isn’t throttled by people without a clue. Fill the vacuum or watch it fill itself with illegal buildout, smuggling corridors, and “the state isn’t here” narratives that metastasize into crime and paralysis. Critics will call it ideology. They always do, because calling infrastructure “ideology” is cheaper than building it. The unglamorous doctrine—National Priority Areas, physical presence, and logistics as deterrence—is exactly the spine we mapped in Where Israel Must Stand.

Israel and the World

Israel Courts Europe’s Right as Brussels Keeps Dodging Consequences

Israel is bringing European nationalist and far-right parties—some with, shall we say, *interesting* histories—to Jerusalem for the upcoming International Conference on Combating Antisemitism (“Generation of Truth”). It’s being framed as statecraft rather than endorsement: maintain channels to forces

that may govern, keep them from drifting into the increasingly explicit fusion of nationalist grievance with anti-Zionism, and pocket whatever diplomatic support is available while Europe's center keeps fragmenting. Netanyahu and Miri Regev hosted a delegation of "Patriots" parliamentarians from Hungary, Austria, Spain, and France, pitched Israel as a front-line node in a broader civilizational struggle, and explicitly tied the threat picture to the marriage of militant Islam and nuclear weapons. Meanwhile, France's National Assembly voted 157–101 to push the Muslim Brotherhood toward EU terror designation, with a five-hour brawl disguised as a debate—supporters describing Brotherhood infrastructure as a radicalization bridge, opponents branding the motion "Islamophobia," and even pro-listing voices warning the Brotherhood's nebulous structure could complicate legal durability at EU courts. Europe's security class is slowly rediscovering what political Islam does in peacetime, while its cultural class keeps insisting that naming the network is the real crime.

ASSESSMENT

Israel's outreach is not really some sort of "values-based diplomacy." Given where we are, it's triage. Europe is splitting into two realities. The security conscious who still understand borders, radicalization pipelines, and regime-backed influence matter. And the moral-theater crowd that treats naming Islamism as racism and then acts surprised when the next "lone actor" turns out to be networked. Israel can work with European nationalists without making the classic mistake of confusing an alignment of interests with a conversion experience. Some of these movements admire Israel as an externalized model of strength while keeping Jews at home as perpetual suspects. However, if European parliaments can stomach Brotherhood listing language, Israel should demand operational follow-through—funding scrutiny, NGO and "charity" transparency, and actual enforcement. Because Europe's favorite hobby is passing resolutions so it can avoid consequences.

Diaspora Targeting Goes Searchable, Then Physical

An Israeli legal NGO is pressing Canadian authorities to investigate and shut down a website run by an entity calling itself "The Maple," which publishes a searchable directory listing Jewish schools, synagogues, and children's camps and branding them "associated" with the IDF—because nothing says civic virtue like turning Jewish kindergartens into a doxxing tool. The NGO's letters went to senior Ontario and Toronto law-enforcement and prosecutorial offices, arguing the directory may cross into hate propaganda, criminal harassment, and property-related offenses, and warning it functions as a threat multiplier amid rising antisemitic incidents. It also formally notified Stripe that the site is using Stripe/Link to monetize and distribute this content and demanded payment services be terminated under policies prohibiting activity that promotes or facilitates harm against protected groups. Europe supplied the downstream demonstration: in Barcelona, more than 20 Jewish graves were desecrated, with the local Jewish community linking the attack to an activist-made map (since removed) that marked Jewish- or Israeli-linked sites and businesses—incitement turned into navigation, navigation turned into vandalism, vandalism waiting patiently to turn into something worse.

ASSESSMENT

Targeting with a user interface. Western institutions keep pretending that a directory of Jewish communal infrastructure is “accountability,” the way a torchlit mob once pretended it was “public sentiment.” The mechanics are always the same: label Jews “complicit,” publish lists “for transparency,” then act shocked when someone treats the list as a menu. Payment processors and platforms love to posture about safety until the threat is to their bottom line. Then they discover procedural paralysis and call it neutrality. Israel and diaspora leadership should treat these projects as hostile intelligence collection and operational preparation—because that’s what they are—and push hard on three fronts: (1) law enforcement action with named accountability, (2) civil liability against operators and enablers, and (3) platform/payment denial so “activism” stops being subsidized and scalable.

Regional Alignments Shift as Saudi Populism Replaces Strategy

Israel’s foreign minister departed for Azerbaijan and Kazakhstan with a 40+ person business/government delegation, scheduling meetings with both presidents and senior officials and running business forums aimed at expanding cooperation in water, agriculture, cybersecurity, health, and finance—while also engaging local Jewish communities and marking Holocaust Remembrance programming in Kazakhstan, newly aligned with the Abraham Accords framework. At the same time, Saudi Arabia’s messaging is sliding into a more openly Islamist-populist register: prominent regime-adjacent voices attacking the UAE as an “Israeli Trojan horse,” anti-Israel and antisemitic themes circulating across state-sanctioned channels, conspiracy rhetoric about an “Abrahamic religion” plot, and sermons from Mecca’s official pulpit containing straightforward incitement—followed by tactical deletions, re-posts, and “we didn’t mean it like that” choreography when Western backlash hits.

ASSESSMENT

Israel should stop treating Saudi Arabia like a romantic prospect and start treating it like a state that wants U.S. protection, regional leverage, and zero price tags—then reaches for anti-Zionist populism when its modernization story hits a wall. When Riyadh’s domestic transformation stalls, Islamism becomes the quickest external influence tool, and Israel becomes the easiest punching bag to prove piety without solving anything. The UAE lane looks more serious precisely because it’s built on capability, commerce, and shared threat recognition rather than sermon-grade theatrics. The Azerbaijan/Kazakhstan track is the same principle: lock Israel into supply chains and mutual economic interests so “pressure” becomes expensive for everyone else. In short: build with the builders and price the hedgers. The region does not reward good intentions. It rewards strength and leverage.

Briefly Noted**Frontline & Security**

- Hezbollah’s chief portrayed the U.S., the West, and Israel as a civilizational enemy and lionized wounded Hezbollah operatives, as Lebanon’s prime minister simultaneously argued a “neutral” international force will still be

needed in the south after UNIFIL's 2027 withdrawal. Translation: Hezbollah keeps selling holy war while Beirut keeps outsourcing sovereignty to foreign uniforms and press releases.

Diplomacy & Geopolitics

- Jared Kushner's \$112B Gaza rebuild pitch includes amnesty/safe-passage language for Hamas fighters and was rolled out without Israeli coordination, with Turkey seated in the proposed oversight structure. "Kill Jews, get beachfront renderings" is not a peace plan—it's a recruitment poster with financing.
- An opinion piece ridiculed Denmark's UN preaching about a two-state solution by urging Copenhagen to model it at home with Greenland amid renewed attention to Danish abuses there.
- Institutional Jew-hate is being normalized across parts of the West and Israel may eventually have to protect Jews where states won't. If Western governments keep treating Jewish safety as optional, don't act shocked when Jews start planning accordingly—and when Israel gets blamed for everyone else's failure.

Developments to Watch

Judea & Samaria

- **Extreme-Scenario Drill Goes Live** — IDF Central Command launched a multi-division exercise with COGAT/Civil Administration to stress-test command-to-GS workflows. They're rehearsing for a Judea-and-Samaria flare-up while everyone stares at Iran.
- **Mount Ebal Drive-by** — Gunfire was reported at an Israeli vehicle near Mount Ebal; no injuries, troops swept the area. These "no harm" shots can be a timer check before a real attempt—especially with the region already twitchy.

Northern Front (Lebanon / Syria)

- **Hezbollah Rebuild Meets Bunker-Busters** — IAF struck multiple Hezbollah infrastructure sites and removed its Arzoun artillery chief while he moonlighted as a schoolteacher.

Gaza & Southern Theater

- **Rafah Opens With Remote Hands** — The PMO framework points to Rafah reopening with EU/PA staffing and *Israeli oversight conducted remotely*. Hamas will test the permeability quickly: identity laundering, smuggling attempts, then a staged "incident" to blame Israel.

Regional Axis (Iran, Houthis, Militias)

- **Carrier Arrives, Decision Still Open** — The USS Abraham Lincoln group is operating near Iran as U.S./Israeli defensive deployments wrap up. When capability arrives before policy, proxies try to write the first chapter for you.
- **Houthis Threaten U.S. Cargo** — The Houthis declared American cargo ships legitimate targets if Washington hits Iran. This is Tehran's cheapest escalation lane: maritime harassment, drones, and "accidents" that spike insurance while the regime claims innocence.
- **Iraq Militia Floats 'Martyrdom'** — Hezbollah urged readiness for "comprehensive war" and raised martyrdom operations if Iran is hit.
- **Iran Cleans Low-Altitude Sky** — Tehran issued a three-month NOTAM suspending VFR/general aviation nationwide, tightening low-altitude control while commercial traffic continues.

Diplomatic & Legal

- **Attribution File Gets Names** — Reporting says Washington is building named lists—up to Khamenei—tied to shoot-to-kill orders in Iran, with Israeli intel inputs. Once names are fixed, sanctions and covert pressure get easier, and regime travel gets riskier.

Home Front & Politics

- **Lapid Briefing, Unity Cover** — Netanyahu will brief Lapid Tuesday as the Iran window tightens. Political air cover for escalation decisions and a signal the government expects a sensitive week.

All in all, not much surprising change. The only meagre surprise in this is just how cheaply they managed to get Bibi to cave on the Rafah opening. If national pressure ramps up against it, coalition math and the budget just got even more difficult. Let's keep an eye on what happens next.

— Uri Zehavi · Intelligence Editor With Modi Zehavi · Data + Research Analyst

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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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