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READER EDITION

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ISRAEL BRIEF

Tuesday, January 27

On this Holocaust Memorial Day, the hostages are finally home. Though, Iran, Rafah, and the coalition are all still demanding decisions.

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THE BOTTOM LINE Israel is rewriting dependency before dependency gets weaponized. Future with less aid from Washington is not disaster—it's incentive to formalize co-development, lock in supply continuity, and treat industrial base as strategic asset rather than procurement afterthought. Blocking Iron Dome software takeover is smart: you don't outsource the nervous system of air defense because a deal is convenient for this fiscal quarter. Israel's battlefield-proven portfolio is now being bought by countries that spent a decade pretending threats were social constructs.

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Flash Brief

- **Iran Decision Clock:** Lincoln enters CENTCOM as Tehran tests delay through threats.
 - **Hostage File:** Ran Gvili recovered; Israel reaches zero hostages in Gaza for first time in over a decade.
 - **Rafah Gate:** Crossing moves toward reopening under outside management and remote Israeli checks; Hamas keeps guns.
 - **Lebanon:** IDF removes Hezbollah artillery chief near Tyre and hits operatives after violations continue.
 - **Budget-Draft:** Shas and UTJ stall budget; Smotrich threatens dissolution.
 - **Europe:** Italy pushes an IRGC terror listing vote Thursday; aviation regulators steer airlines away from Iran.
 - **North America:** U.S. antisemitism suits advance as Canadian leaders discuss arresting Netanyahu and downgrading IHRA.
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The War Today

Lincoln Arrives, Sanctions Tighten, and Proxies Rehearse Escalation

The USS Abraham Lincoln strike group has entered CENTCOM's area as U.S. defensive systems continue shifting into the region. Washington is signaling two parallel coercion lanes: kinetic options (including reported consideration of precision strikes on senior Iranian officials tied to protest crackdown) and economic strangulation (new sanctions targeting the IRGC's oil "shadow fleet," plus reward offers for identifying IRGC-linked oil transfers).

Inside Iran, the regime continues rolling internal security campaigns—live fire, mass arrests, expedited sentencing. Tehran maintains its usual messaging—full-alert language and carrier-threat rhetoric—while trying to widen pressure through proxies: Houthis cue a Red Sea return and Iraqi militias threaten "comprehensive war," explicitly floating jihad framing if Iran is hit. Civil aviation is responding. Europe's aviation-safety apparatus warns operators away from Iranian airspace, and travel advisories tighten around Iraq's border areas as the region anticipates misidentification risk and air-defense triggers.

ASSESSMENT

Carriers, interceptors, SIGINT platforms, and sanctions are arriving before a decision, so Tehran attempts to make "delay" appear like stability. This approach will not succeed. The reward-and-sanctions strategy targets the regime's revenue: oil cash that finances repression domestically and rockets abroad. Israel should treat "talks" chatter as a timing tool, not a peace channel, and push for end-states that physically remove capability—uranium stockpiles, missile production tempo, and proxy logistics—rather than paper agreements leaving the gun economy intact.

Last Hostage Returned; Rafah Opens Anyway; Hamas Keeps Its Guns

IDF forces recovered and identified Master Sgt. Ran Gvili from a cemetery in eastern Gaza City after an intelligence-driven operation. With his return, Israel has no living or deceased hostages in Gaza for the first time since 2014—emotional closure earned through two years of pressure, raids, and system-wide commitment to “leave no one behind.”

Netanyahu publicly framed the next stage as Hamas disarmament and Gaza demilitarization—explicitly not reconstruction—while the U.S. president echoed the same demand. Hamas, meanwhile, lobbies to preserve governing muscle by absorbing roughly 10,000 “police” and tens of thousands of civil servants into new administrative architecture and courts Turkish backing. Reporting around the postwar security plan highlights thousands of PA-linked security personnel training abroad for Gaza deployment under international sponsorship. The Rafah crossing—Hamas’s lifeline—now moves toward reopening under external management, converting the lever Israel held into a bureaucratic experiment run by people without consequences.

ASSESSMENT

While the hostage issue closes, it does not change the battlefield. Hamas still holds weapons, maintains coercive control, and treats “disarmament” as diplomatic language for others. A returned body is not compliance. Phase two conditions remain unmet until rifles and command chains are physically removed. Opening Rafah prematurely teaches Hamas that holding out and offering “effort” produces Western rewards—access and money labeled progress. This is moderate-laundering in its purest form: governance language preserving jihadist capability long enough to rebrand. If Gaza reconstruction is desired, start with sewage and rubble. The moment Hamas’s security organs normalize—under any flag, PA badge, or “technocratic” costume—the next war is being subsidized and bills outsourced to Israeli civilians.

Lebanon Talks Sovereignty and Militias Talk War

Israel continued enforcement strikes in southern Lebanon against Hezbollah operatives tied to artillery and rocket rehabilitation—targeting commanders in and around Tyre and additional operatives in Nabatieh and Deir Qanoun areas—explicitly framing these as responses to ceasefire-understanding violations and efforts to restore launch capability. Hezbollah’s leadership publicly threatened regional ignition if Iran is targeted, while Lebanese state sources signaled fury and rejection from the presidency.

ASSESSMENT

Lebanon’s presidency can protest sovereignty, but Hezbollah holds actual force monopoly and uses it as an Iranian extension cord. Anger from Beirut matters only if it produces seizures, arrests, and dismantling. Otherwise it remains a press release designed to keep Lebanon in the “victim” category while Hezbollah reloads.

Inside Israel

Smotrich Threatens Dissolution as Haredi Parties Hold Budget Hostage

The coalition delayed the budget vote from Monday to Wednesday after Shas and United Torah Judaism refused backing without prior movement on conscription framework. Netanyahu accepted the delay and convened urgent meetings with Smotrich, Aryeh Deri, and Finance Committee chair Moshe Gafni. Smotrich then escalated publicly—warning Netanyahu that if the budget doesn’t pass “today,” it effectively doesn’t pass and threatening Knesset dissolution—an unusually blunt signal that coalition patience for “service for some, leverage for others” is evaporating.

ASSESSMENT

This represents coalition politics at its most honest: the state needs bodies; Haredi parties need exemptions; the budget becomes escrow. The dissolution threat isn’t “brinkmanship” but admission that the draft file moved from culture war to war-sustainment mathematics, and the public won’t finance infinite deferments with shrinking serving class. Either the coalition produces real enforcement architecture, or it discovers its governing majority was rented, not built.

Arab Crime Wave Forces Political Rewiring as Trust Erodes in Plain Numbers

Arab parties moved toward reconstituting a unified slate after crime wave and mass street pressure made fragmentation look like self-harm. Hadash, Ta’al, Balad, and Ra’am agreed to pursue a Joint List framework, driven by community demands for leverage against rampant violence (252 killings in 2025 cited as backdrop) and practical reality of the 3.25% threshold.

Ra’am—long reluctant to reunify—signaled it will only accept a “technical union” for election campaign, with each party free to split into separate Knesset factions afterward, because Mansour Abbas still wants options to enter governing coalition (including Likud-led ones). Projections float as high as 16 seats for unified list, but leadership order and seat allocation remain unresolved; Balad’s inclusion invites disqualification attempts while “saving” roughly two seats’ worth of votes that would otherwise be wasted below threshold.

ASSESSMENT

A reinvigorated Joint List isn’t automatically threatening, but Ra’am’s kingmaker ambition means national-security and policing policy can be priced through coalition desperation—especially when turnout and seat counts decide whether the country gets stability or roulette.

Israel and the World

Progressives Normalize Arrest Talk, Jews Answer With Litigation

Two U.S. court cases alleging antisemitism are moving forward—one involving a Jewish Israeli researcher saying a university lab environment escalated

into professional sabotage, lockouts, and fabricated sexual-harassment allegations; another tied to a 2024 encampment allegedly operating as enforced “Jew exclusion zone,” with federal judge allowing claims to proceed against key organizer entities while dismissing claims against several groups for insufficient linkage and control.

In Canada, the next rung of political normalization displays itself: four candidates for leadership of a major left-wing party publicly agreed Israel is committing “genocide,” endorsed “right of return” language and nakba recognition, called for sanctions on organizations tied to Israeli defense or settlement activity, and said they would arrest Israel’s prime minister if he visited Canada—alongside demands to replace IHRA definition of antisemitism with alternatives explicitly de-linking anti-Zionism from antisemitism. This represents legal and political pre-loading of selective enforcement.

ASSESSMENT

U.S. litigation forces discovery, timelines, sworn statements, and consequence—exactly what the slogan economy avoids. Canada’s “we’ll arrest Netanyahu” posture performs toughness aimed at Israel because it is safe targeting, and because Jews are the only minority Western progressives feel comfortable disciplining while insisting they’re rescuing the world. Strategic risk for Israel lies in precedent rather than hurt feelings. Border harassment of veterans becomes policy. Financial de-risking becomes “ethics.” Jewish communal infrastructure becomes fair game under “associated with the IDF” labels. Treat this as enforcement war, not narrative debate.

Washington Aid May Taper; Israel Locks Down Iron Dome’s Brain

Israel is quietly repositioning alliance mechanics with Washington while hardening defense sovereignty. Officials are preparing talks with Trump administration toward new 10-year security framework, with explicit emphasis shift: fewer “cash grant” dynamics over time and more joint military and defense projects—planning for future where annual U.S. grant component is no longer politically viable.

Israel’s defense sector experiences surge. Public defense companies report roughly NIS 2.2 billion in announced orders this month, with heavy demand spanning active protection, electronic warfare, drone optics, engine refurbishments, and munition-adjacent manufacturing—while industry sources flag supply-chain strain as global rearmament stacks orders faster than components arrive. Israel’s Ministry of Defense signed multi-year procurement agreement worth \$183 million for aerial munitions replenishment. Jerusalem drew bright red line on crown-jewel control: Israel blocked proposed U.S. holding-company takeover of the firm developing command-and-control software for Iron Dome—keeping the system’s “brain” under Israeli security supervision.

ASSESSMENT

Israel is rewriting dependency before dependency gets weaponized. Future with less aid from Washington is not disaster—it's incentive to formalize co-development, lock in supply continuity, and treat industrial base as strategic asset rather than procurement afterthought. Blocking Iron Dome software takeover is smart: you don't outsource the nervous system of air defense because a deal is convenient for this fiscal quarter. Israel's battlefield-proven portfolio is now being bought by countries that spent a decade pretending threats were social constructs.

Briefly Noted

Culture, Religion & Society

- **JNS:** Minnesota Gov. Tim Walz compared Minnesotans fearful of ICE activity to Anne Frank, drawing rebuke from U.S. antisemitism envoy Yehuda Kaploun for “historically illiterate” Holocaust trivialization. When politicians use Holocaust as rhetorical tool, they don't just cheapen history—they mainstream Jew-hate narratives while smearing law enforcement as new Gestapo.
- **Jewish Chronicle:** Holocaust survivor Mala Tribich addressed UK cabinet (as part of Holocaust Memorial Day), urging Prime Minister Keir Starmer's government to “do what needs to be done” to tackle antisemitism.

Frontline & Security

- **Middle East Forum:** Review of U.S. nonprofit filings alleges Mormon-linked charities—including Globus Relief and Lifting Hands—funneled tens of millions in support to Islamist aid groups tied to Hamas-aligned and Muslim Brotherhood-linked networks. “Humanitarian” grantmaking is favorite laundering layer for extremist ecosystems.
- **Ynet:** Israeli security officials acknowledged thousands of items—including batteries and tobacco—reached Hamas in Gaza over past year via drones, illicit routes, and concealment within aid trucks despite declared blockade. The gap between “full blockade” messaging and porous execution lets Hamas rebuild capability and revenue.

Diplomacy & Geopolitics

- **Israel National News:** Leaked testimonies cited by Al-Arabiya allege fugitive senior Muslim Brotherhood figure exploited women in families of imprisoned members through harassment and blackmail under guise of distributing aid.

Developments to Watch

Judea & Samaria

- **Area A Mis-Entry Tripwire** — The IDF says PA security forces fired at an Israeli civilian who mistakenly entered Nablus, with liaison channels activated to deconflict.

Northern Front (Lebanon / Syria)

- **Lebanon Tries To Muzzle Hezbollah** — Hezbollah warned it will respond if Iran is hit; Lebanese president is furious and rejects opening a front from Lebanon.

Gaza & Southern Theater

- **Blockade Claims vs Drone Reality** — Israeli officials acknowledge Hamas still received thousands of items via drones, illicit routes, and concealment inside aid trucks over past year. If Rafah loosens and inspections go bureaucratic, expect resupply market to scale faster than “demilitarization” meetings.

Regional Axis (Iran, Houthis, Militias)

- **Deal Terms Go Maximalist** — U.S. officials are floating terms requiring Iran to eliminate enriched-uranium stockpiles, end domestic enrichment, curb long-range missiles, and cut off proxies. Even if “agreed” to, Iran won’t follow through.
- **Blockade Talk Hits the Gulf** — Reporting says Trump is weighing naval blockade, while Iranian commanders warn U.S. carriers become targets and hint at Yemen-linked missile/drone lanes. Maritime harassment is Tehran’s cheap lever—and the first “accident” won’t be accidental.
- **UAE Slams the Door Shut** — Abu Dhabi says it won’t allow its airspace, territory, or waters to be used for action against Iran. This constrains basing/overflight politics and hands Tehran wedge to split “coalition” optics while U.S. capability sits offshore.

Diplomatic & Legal

- **Civil Aviation Starts Fleeing** — EASA is advising operators not to enter Iranian airspace at any level, and the UK tightened Iraq travel guidance.
- **IRGC Listing Vote Window** — Italy’s FM says he will push EU ministers on Thursday to designate IRGC as terrorist organization. Watch not speeches but the blockers.
- **Embassy Threat Plot in Baku** — Azerbaijan says it arrested ISIS-aligned suspects planning attack on foreign embassy.

Home Front & Politics

- **Budget Vote Becomes a Tripwire** — The budget is now delayed to Wednesday as Haredi parties hold it hostage to draft framework and Smotrich threatens dissolution.

- **Compressed PM Calendar, On Purpose** — Judges shortened Netanyahu's court session tomorrow and he's briefing Lapid on security.

Hostage return doesn't buy calm—it removes excuses, and it makes Rafah the immediate compliance test, because any “managed reopening” will be stress-tested by smuggling, identity laundering, and staged incidents within days. Coming up, watch three triggers: a U.S. decision on Iran that activates proxies by default, Hezbollah proving it can still set the northern agenda when Beirut objects, and the budget vote turning the draft fight into a governing crisis at the exact wrong moment.

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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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