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READER EDITION

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ISRAEL BRIEF

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Iran moves from ‘talks’ to target lists, and Washington answers by overtly building a regional shield.

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THE BOTTOM LINE The UNGA presidency bid is a procedural hacks and propaganda platform toward statehood—rather than actual governance and de-radicalization. They’re not building a state, they’re building leverage. The Dutch coalition text reads like a familiar European bargain. Moral posture today, UNRWA restoration tomorrow—and sanctions as a substitute for accountability on Hamas and the PA’s own political objectives. Propaganda becomes permission, and permission becomes intimidation—especially against diaspora Jews who are treated as local proxies for a foreign war.

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Flash Brief

- **Oman Talks:** Negotiations pause; Iranian FM limits scope to nuclear file and threatens strikes on U.S. bases.
- **Force Stack:** USS Abraham Lincoln shifts into Arabian Sea; Patriot/THAAD coverage expands across twenty regional bases.
- **Allied Air Cover:** UK deploys six F-35s to Cyprus as loitering-munition defense layer thickens.
- **Jerusalem–Washington:** Netanyahu meeting with Trump moves to Feb. 11; Israel pushes missiles and proxies in scope.
- **Gaza Contact Line:** IDF issues Zeitoun evacuation notice then strikes; troops kill infiltrators near the Yellow Line.
- **Lebanon Signal:** Hezbollah accepts Wafiq Safa's resignation as disarmament pressure rises and channels reorganize.
- **Internal Control:** Army Radio shutdown hits High Court barrier; PA banking links face Israeli leverage over terror stipends.

The War Today

Tehran Threatens Bases; Washington Fortifies The Region

U.S.–Iran negotiations in Oman paused with agreement to continue in coming days, but Iran's stated position hardened. Narrower agenda. Zero concession on enrichment. Louder threats on regional retaliation. Iranian FM Abbas Araqhchi publicly described the atmosphere as "positive" while explicitly limiting talks to the nuclear issue—though he flatly rejected "no enrichment" as unacceptable, and warned that if the U.S. attacks Iran, Tehran will strike American bases across the region. Iranian messaging also expanded a target hierarchy (with Al Udeid in Qatar repeatedly emphasized) and framed Washington as the side "backing down" from Iranian red lines.

Senior U.S. envoys Jared Kushner and Steve Witkoff visited the USS *Abraham Lincoln* alongside CENTCOM's commander as the carrier strike group moved into the Arabian Sea. U.S. citizens were again urged to leave Iran amid reports of tightened security, unrest, and ongoing/worsening internet restrictions and blackouts. Regional missile defense coverage has been expanded and described as completed across 20 bases via Patriot/THAAD deployments, with the UK also sending six RAF F-35s to Cyprus (plus refueling aircraft) as part of a defensive umbrella against loitering munitions and spillover risk.

Israeli Air Force leadership reviewed and approved operational plans for a potential Israeli operation if Israel is attacked. And Netanyahu's Washington trip was pulled forward—his office says he will meet President Trump this coming Wednesday. In Iran, unexplained explosions were reported near an oil facility in Ardabil, while reporting flagged a potential new wave of unrest

building toward February 17–18 as the 40-day mourning window closes for those killed in January crackdowns.

ASSESSMENT

Tehran is explicitly refusing the only outcome that actually prevents the next war—capability removal—while demanding that Washington treat that refusal as a basis for continuing talks. A feint designed to buy time for enrichment continuity, missile production, proxy regeneration, and internal repression under cover of process.

Washington's visible posture-building is the correct grammar for coercion, but it only works if it is paired with a willingness to end the ambiguity phase. Iran's threat messaging about striking bases and naming specific regional targets outside of military assets is deterrence-by-hostage against Gulf capitals and a direct attempt to make regional partners pressure the U.S. to "avoid escalation" even as Tehran keeps every escalation tool intact. Israel is pulling the Trump meeting forward as Jerusalem is trying to prevent a "nuclear-only" diplomatic umbrella from freezing action while leaving missiles and proxies hanging over Tel Aviv.

Evacuation-Warned Strikes Reset Gaza Enforcement Under "Ceasefire" Cover

The IDF issued an evacuation warning for a specific residential building in Gaza City's Zeitoun neighborhood—its first official advance warning tied to a Gaza strike since the ceasefire began—then struck the site described as Hamas weapons depot. The IDF also hit a Hamas weapons-production site in Khan Younis overnight as part of the same response cycle. The near-daily Yellow Line breaches continued. Several operatives crossed and approached reservists in the north—troops fired to remove the threat and at least one terrorist was killed. The IDF identified one of the recently eliminated infiltrators as Muhammad Salah al-Din Khaled Abu Raqba, a Hamas operative who participated in the October 7 massacre.

Hamas's leadership is now openly trying to veto the core premise of Phase 2: senior Hamas figure Khaled Mashaal again rejected disarmament, framed weapons retention as non-negotiable, and praised October 7—while Washington is still building bureaucracy around Gaza's "day after," including a planned February White House meeting of a newly formed "Board of Peace for Gaza" pitched as an initial convening to mobilize reconstruction funding and advance the next phase of the plan. Meanwhile, the next optics trap is already queued: flotilla organizers announced a March 29 attempt involving around 100 boats and roughly 1,000 participants from some 100 countries, advertising "doctors," "engineers," and "genocide researchers" as human-shield branding in maritime form.

ASSESSMENT

Mashaal's renewed refusal to disarm is simply admitting the doctrine we all know they abide by. Hamas wants reconstruction cash, international protection, and operational freedom—without surrendering the armed monopoly that makes Gaza a terror statelet. The Board-of-Peace concept and the looming flotilla both function as pressure tools aimed at one outcome: constrain Israeli force options while Hamas retains weapons.

Inside Israel

Israel Tries Bracelets, Budgets, And Bank Leverage

Israel is again weighing a hard instrument against the Palestinian Authority's pay-for-slay stipend architecture. Israel demanded the Bank of Palestine close 3,400 accounts allegedly used to route such payments. The bank refused, prompting cabinet-level discussion about severing correspondent banking channels via Israeli banks—an option repeatedly warned could tip the PA toward severe economic stress. Which would, as we flagged last week, increase the risk of collapse of the PA which would descend the enclave into further tribal militancy.

Israel's government has approved a multi-year plan aimed at the “hilltop youth” problem-set in Judea and Samaria—less as a single policy than as a whole-of-government wiring diagram. At its core is a new Defense Ministry “Hilltops Administration” meant to coordinate ministries and councils, standardize data collection, and push programs from paper into execution. The push comes with roughly NIS 2 million per year, plus additional Defense Ministry funding for welfare and enlistment-prep frameworks; an Education Ministry track budgeted around NIS 36 million; an expansion of social-work staffing around NIS 12 million; a violence-prevention expansion exceeding NIS 10 million; National Security Ministry funding of about NIS 5 million annually; and a Labor Ministry vocational/employment expansion projected around NIS 50 million.

This is the state trying to isolate a small, violent fringe without smearing an entire public. Even the most critical analysis admits the group is several hundred people at most. Estimates show only roughly 30 or so of the core group come from Judea and Samaria. Nor are they embraced by the community. Settlement leadership has condemned major attacks as morally and strategically destructive to the settlement enterprise. Most of the teens in this orbit are at-risk youth and drifters, not “representatives” of established communities. The majority of the cohort shows up from Israel proper (from places like Haifa and elsewhere) looking for belonging, adrenaline, ideology, or simply a place to land.

The baseline violence problem in the area is still overwhelmingly Palestinian terror and organized militant activity, not Jewish hooliganism—however damaging the latter is morally, diplomatically, and operationally. There are thousands upon thousands of Palestinian attacks and attempted attacks on Jews in Judea and Samaria a year—including large numbers of shooting and bombing attempts—Israeli security services never seem to have a slow day on the ridge. That doesn't excuse Jewish nationalist crime; it explains the asymmetry settlers are pointing at when they say the spotlight often lands hardest on a fringe while the larger threat environment keeps burning.

ASSESSMENT

The state is simultaneously trying to corral a small extremist subculture and confronting a much larger ecosystem of Palestinian terror attempts and attacks—measured in the thousands annually even by conservative counting that includes low-grade assaults like rocks and Molotovs. The PA cannot keep structuring stipends that reward terrorism and then plead fragility when confronted with financial consequences. At the same time, Israel should be clear-eyed about second-order effects: collapsing banking channels can create exactly the kind of cash economy and instability that strengthens armed groups. Use leverage—but use it like a scalpel, not like a hammer. If Israel wants to protect both security and settlement legitimacy, it has to hold two ideas at once: Treat the violent fringe as criminals—fast, boringly, and consistently—without laundering the slander that they represent the settlement public. And stop pretending the overall violence ledger is symmetric.

Cash Raids And Coalition Math Test State Authority From Court To Street

Police intensified the “follow the money” approach against organized crime. Raids on Lod crime-linked properties produced seizures exceeding NIS 2.5 million in mixed currencies. Police services made multiple arrests. Investigators are probing suspected tax evasion and off-the-books labor financing, including claims that large cash stockpiles were used to pay dozens of Palestinian laborers. Alongside enforcement, the political map is shifting inside Arab Israeli society. Bloc politics are dissolving into a three-column reality and Arab parties are reorganizing toward a consolidated list with the explicit aim of maximizing turnout and seats.

ASSESSMENT

The cash seizures are the right kind of enforcement: stop romanticizing “community violence” and start bankrupting it. Guns matter, but money is oxygen—and when you find safes full of cash with declared income that doesn’t come within binocular distance of the stash, you’re applying pressure. Finally, Arab politics as a coalition variable is arithmetic under fire. Just don’t pretend you can neglect the sector, lecture it, and then act shocked when it stops playing the role assigned to it in 1992.

Israel and the World

New Jersey Result Signals Anti-Israel Left’s Growing Electoral Ceiling

In New Jersey’s 11th Congressional District, far-left activist Analilia Mejia narrowly led a crowded Democratic primary field in an affluent, historically moderate suburb—running roughly 29–28% ahead of former Rep. Tom Malinowski, with pro-Israel-aligned Tahesha Way a distant third at 17%. Mejia was the only candidate in the field to brand Israel’s war against Hamas as “genocide,” and she issued condemnations of Israel days after October 7 (without naming Hamas’s massacre).

The result lands as another data point that the socialist/activist wing is no longer confined to deep-blue urban districts. The pro-Israel intervention also

misfired: a \$2.3 million ad spend aimed at damaging Malinowski helped depress the presumed frontrunner without consolidating the moderate vote—an expensive way to potentially elevate the least palatable nominee for a swing-ish seat that backed the Democratic presidential ticket by single digits in 2024. Simultaneously, Washington approved a \$6.6 billion weapons package to Israel—including 30 Apache attack helicopters and 3,250 armored tactical vehicles—while bypassing standard review procedures, triggering predictable backlash among congressional Democrats and feeding the next iteration of the “aid as leverage” fight just as U.S.–Iran diplomacy and regional strike-math tighten the timeline.

ASSESSMENT

This is the American warning light Israel’s friends keep ignoring. The anti-Israel faction doesn’t need to win national majorities to impose vetoes—it just needs to win primaries, intimidate incumbents, and make “supporting Israel” feel like a career risk inside the party’s bloodstream. The result in New Jersey isn’t really about the one district but rather the ceiling for slogans like “genocide” in places that never used to treat ideology as the hiring standard. Pro-Israel groups also have to stop confusing “spend” with “strategy.” If your intervention fractures the center and elevates the fringe, you didn’t defend Israel—you subsidized the enemy’s narrative infrastructure. Meanwhile, the arms package fight shows how quickly procedural complaints mutate into substantive opposition once the activist wing gets its hooks in. The smart move is to assume U.S. support will become more conditional, more episodic, and more performative over the next Congressional cycle. Israel should treat today’s favorable procurement environment like a closing window—buy depth, stockpile, and remove single-point dependencies—because American politics is turning “weapons for allies” into a purity-test theater.

Institutional Capture Advances: Funding, Titles, Then Enforcement Against Jews

A U.S. federal judge ordered Carnegie Mellon University to produce discovery related to nearly \$1 billion in Qatari funding in a civil-rights lawsuit brought by a Jewish student alleging antisemitic discrimination and institutional retaliation. The court found Qatar’s financial and contractual ties potentially relevant to how Jewish civil-rights complaints were handled, including allegations that a senior DEI/Title IX official’s compensation was partly Qatar-funded and that the student was discouraged from filing a formal antisemitism complaint that would trigger an investigation. The ruling also highlighted contracts requiring compliance with Qatari “cultural, religious and social customs,” and the case surfaced additional conduct allegations, including a senior DEI official secretly recording the student.

In the UK, West Midlands Police opened a criminal investigation into social-media promotion for a Birmingham launch event by a group calling itself the “Anti-Zionist Movement,” which marketed itself as “pro armed resistance” and supportive of “zio eradication,” while featuring figures tied to Iranian state media and repeat “Jewish supremacy” conspiracism; the original venue canceled on “safety” grounds, police met with local Jewish community stakeholders, and investigators are treating the promotional messaging itself as a potential offense.

ASSESSMENT

You don't need to persuade universities or civic bodies to hate Jews—you just need to fund the bureaucracy that decides which complaints “count,” then surround it with ideology that treats “Zionist” as the one safe target. Qatar doesn't have to write “silence Jews” into a contract, it just has to bankroll the offices that quietly steer Jewish students away from formal processes and into dead-end “informal resolutions.” Which, over time, gives activists (as we have seen over the past few years) permission to rebrand eliminationist politics as “anti-Zionism,” slip it into respectable venues, and dare authorities to enforce the law while hiding behind the costume of “speech.” The good news is that enforcement is starting to reappear—criminal investigations, discovery orders, forced transparency. The bad news is that it took years of intimidation for institutions to rediscover what they're for.

Palestine's Status-Upgrade Offensive Expands From UN Chambers to Sports Stands

The Palestinian Authority is attempting to upgrade its standing at the United Nations by pursuing the presidency of the General Assembly for the 2026–2027 session—an unprecedented push for a non-member entity that would turn a procedural rotation slot into a legitimacy multiplier, with a vote scheduled for June 2026. In Europe, the Netherlands' new coalition agreement signaled drift toward standard EU posture with explicit commitment to a “viable Palestinian state,” demands to end settlement expansion, framing Israeli conduct in Gaza as unlawful, restoration of cooperation with UNRWA inside Palestinian aid budgets, and continuation of national/EU sanctions on members of Netanyahu's government and associates pending “meaningful steps” toward peace and international-law compliance. So much for the Dutch as an ally. PA official messaging again framed UNRWA not as humanitarian relief but as a political instrument to preserve the “right of return” narrative and keep refugee status permanent across generations.

ASSESSMENT

The UNGA presidency bid is a procedural hacks and propaganda platform toward statehood—rather than actual governance and de-radicalization. They're not building a state, they're building leverage. The Dutch coalition text reads like a familiar European bargain. Moral posture today, UNRWA restoration tomorrow—and sanctions as a substitute for accountability on Hamas and the PA's own political objectives. Propaganda becomes permission, and permission becomes intimidation—especially against diaspora Jews who are treated as local proxies for a foreign war.

Briefly Noted

Frontline & Security

- **Islamic State Mosque Bombing:** IS claimed responsibility for a suicide bombing at a Shi'ite mosque in Islamabad that killed at least 31 people and wounded 169 during Friday prayers. Pakistan's insurgency problem is metastasizing into high-profile urban massacres again—fertile terrain for jihadist networking that doesn't stay “local.”

Culture, Religion & Society

- **East London Synagogue Purchase:** A Muslim group in Whitechapel put down a £235,000 deposit and launched a £3.5 million appeal to buy and convert one of East London's last synagogues into a mosque and community center. Another Jewish building flips because the Jewish community can't—or won't—compete for its own real estate, which is how a century of presence quietly gets liquidated.

Domestic & Law

- **IDF Messaging Gaffe:** An IDF general echoed Hamas's "70,000" Gaza death figure in a briefing and the IDF later scrambled to clarify it wasn't official data, after global outlets ran with the mistake. Israel keeps donating narrative victories through amateur-hour messaging—hire professionals or keep feeding the lawfare machine for free.

Economy, Tech & Infrastructure

- **Iran's Digital Control Plan:** Leaked Iranian regime documents describe a long-term plan to normalize nationwide internet shutdowns, force migration to state platforms, and criminalize circumvention tools, paired with expanded AI and data infrastructure. Tehran is building a digital choke collar to survive the next uprising—meaning a tougher, quieter regime with better tools for repression and cyber mischief.

Diplomacy & Geopolitics

- **U.S.–China Nuclear Standoff:** The U.S. accused China of conducting covert nuclear explosive tests as it pushed for a broader arms-control deal after New START expired, while Beijing rejected joining new talks.
- **Turkey's Nuclear Path:** Turkey's civilian nuclear buildout—anchored by the Russian-built Akkuyu plant—continues as Erdoğan-era officials openly gripe about the "unfairness" of nuclear restrictions and Ankara warms ties with nuclear-armed Pakistan. "Peaceful" infrastructure plus political intent is the recipe for a latent weapons option, and Israel should treat that pathway as a future constraint on regional maneuvering, not a hypothetical.

Developments to Watch

Judea & Samaria

- **Detention-base restraint failure:** A detained Gaza suspect broke restraints and attacked a servicewoman at a Jordan Valley base before being shot and re-secured.

Northern Front (Lebanon / Syria)

- **Hezbollah reshuffles the liaison shop:** Hezbollah accepted Wafiq Safa's resignation and quietly replaced him, with reporting that the liaison unit is being stripped of some powers. That's an organization tightening internal security as "state disarmament" pressure mounts.

Gaza & Southern Theater

- **Zeitoun warning:** The IDF issued a specific evacuation warning in Gaza City's Zeitoun area ahead of a strike, then hit the building.
- **Yellow Line probes keep coming:** IDF reports repeated crossings toward troops, including an operative assessed as an Oct. 7 infiltrator.

Regional Axis (Iran, Houthis, Militias)

- **Muscat talks: "next round" trap:** The Oman channel paused with agreement to continue, while Tehran publicly locks missiles out of scope and keeps enrichment as the non-negotiable.
- **Iran names the U.S. base list:** Araqhchi again warned that any U.S. strike triggers attacks. Tehran is turning Gulf capitals into human shields and lobbyists—queue the frantic back-channel pressure on Washington.
- **Carrier in the box, drones in the air:** The USS *Abraham Lincoln* group is operating near Iran as the U.S. piles up regional assets. This is the exact setup Iran uses for drone harassment and "accidental" maritime incidents.
- **Iran unrest cycle reloads:** Reporting flags protest planning around Feb. 17–18, with regime tightening control after January's killings.

Diplomatic & Legal

- **Tariff threat turns global:** Trump signed an order threatening 25% tariffs on countries doing business with Iran.

Home Front & Politics

- **Washington meeting compresses the decision chain:** Netanyahu is set to meet Trump on Feb. 11, with Jerusalem insisting missiles and proxies enter any deal. The lead-up is where the framing war happens: watch for leaks designed to box Israel in before the meeting starts.

Tehran is openly pricing its survival through everyone else's airfields. Washington answers with hardware and warnings, and Israel accelerates the political calendar to prevent a "nuclear-only" umbrella from freezing the full fight—missiles and the axis. If Iran's mid-February unrest cycle ignites, the regime's instinct will be to export crisis outward because it's cheaper than reform. The region is being wired for a decision, and Tehran is trying to make everyone else pay the cover charge.

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