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READER EDITION

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ISRAEL BRIEF

Wednesday, February 25

The strike decision sits at the White House. Every actor in the region is now positioning for an outcome, not a negotiation.

◇ URIEL ZEHAVI

THE BOTTOM LINE The Yale data does not discover something new. It merely quantifies what anyone paying attention has observed for years. Namely, that the people most likely to deny Jewish national self-determination are the same people most likely to hold classic antisemitic beliefs about Jews in their own country. The researchers treat this as a revelation. What the data does is strip away the dodge — the “I’m not antisemitic, I just oppose Israeli policy” formulation that lets campuses, parties, and HR departments declare the matter closed. A 3-to-1 ratio in antisemitic belief between Israel-deniers and Israel-affirmers is demographic of Jew-hate that has found a laundering vehicle. Polanski is a case study in the political mechanics: a politician who knew what Zionism meant when he needed Jewish votes, and now finds it convenient to “equivocate” when the mob wants its resolution. His mother and sister support Israel and Zionism. His former self did too. The only thing that changed is the political price.

CLASSIFICATION

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TRUMP's ultimatum expires Friday. Eleven F-22s are already on the ground in Israel. A senior U.S. official told Israeli media that he wouldn't be surprised if Trump declared war on Iran imminently. That is where we are. The week that began with Iran buying diplomatic hours in Geneva has the U.S. force posture past the point of ambiguity — and every regional actor, from Hezbollah to the LAF to the PLO, adjusting their public statements to the new reality while hedging their private commitments. None of that is reassurance.

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Flash Brief

- **F-22s in Israel:** Eleven U.S. stealth fighters land at an IAF base in southern Israel from RAF Lakenheath.
- **Strike Decision:** Senior U.S. official says preparations are complete; decision now rests with Trump.
- **Hezbollah Contradiction:** Lebanese PM says Berri passed private non-intervention guarantees; Qassem publicly declared the opposite.
- **Samaria Operation:** IDF launches multi-day counter-terrorism operation across three villages in Binyamin region.
- **PIJ Commander Confirmed:** Palestinian Islamic Jihad acknowledges its rocket developer worked simultaneously as a Doctors Without Borders physiotherapist.
- **Haredi Draft:** AG tells High Court no economic sanctions plan exists; declared evaders up from 2,257 to 16,880 in seven months.
- **Evacuation Failure on Record:** State Comptroller finds “total disorder” in post-October 7 evacuations — Kfar Aza took 36 hours, no approved protocol existed.
- **NGO Deadline:** Licenses for 37 aid groups expire March 1; 17 petition High Court; COGAT says affected groups represent under 1% of Gaza aid.
- **PLO Rejects Disarmament:** PLO Secretary-General states Hamas is not a terror organization, opposes disarmament, and will not reform PA curricula.

THE U.S. military footprint in the region reached a new threshold. Iran ran its live-fire exercises and its deputy foreign minister warned that “a war can be started — but ending it is not easy.” Hezbollah issued contradictory guarantees through two channels simultaneously, which is the organizational behavior of a group that does not know what it will do. The PLO told Washington, on the record, that it will do none of the things Washington says it requires. And inside Israel, a state comptroller report confirmed what most people already suspected about October 7. The system knew what it was supposed to do. Didn’t fund it. And improvised when it mattered.

The War Today

IDF Binyamin Operation Targets Recurring Attack Corridor in Southern Samaria

The IDF launched a multi-day counter-terrorism operation in the Binyamin region villages of Turmus Aya, Sinjil, and Al-Lubban ash-Sharqiya — towns flanking Route 60, where stonings, Molotov cocktails, and laser attacks have surged in recent weeks. Al-Lubban ash-Sharqiya has had its main access road closed by the army after repeated attacks. An Israeli woman sustained light wounds near the village earlier this month. And on January 31 IDF soldiers shot three Palestinian stone-throwers there, killing one. The operation follows a 2025 tally from Hatzalah Judea and Samaria — cross-checked against

official security agency data — of 5,051 attacks against Israelis across Judea and Samaria during the year. 3,299 stone-throwing incidents. 458 Molotov cocktail attacks. 655 laser-blinding attempts. 286 explosive devices. 19 shooting assaults. Twenty-four Israelis were murdered in Judea and Samaria in 2025 and more than 400 wounded. The municipality of Eli, situated between two operation zones with roughly 4,790 residents, notified the public to expect gunfire, explosions, and increased security force movement.

ASSESSMENT

Five thousand attacks in a calendar year is clearly a sustained offensive requiring permanent operational response. The IDF keeps cycling through the same villages — Al-Lubban ash-Sharqiya has been blockaded, unblockaded, and blockaded again — because the underlying infrastructure that generates the violence, the schools that line Route 60, the networks that supply the Molotovs, the communities that celebrate each successful attack, are never dismantled. A multi-day operation is not a dismantling. It is a pressure application—and everyone in those villages knows the difference. The 2025 casualty data needs to be read plainly: 24 Israeli dead and 400-plus wounded from a theater that produces almost no Western coverage and fewer international condemnation statements than a single IDF airstrike on a Hamas asset.

Lebanon Incident Near Marjeyoun Intersects with Israel's Hezbollah Deterrence Message

The Lebanese Armed Forces (LAF) claimed Tuesday that its soldiers came under fire from an IDF drone near Marjeyoun while conducting operations in southern Lebanon, with the drone flying at low altitude and issuing warnings to vacate the area. The LAF said it reinforced the post and escalated the incident to UNIFIL. The IDF issued no public statement. The incident coincides with Israel delivering an indirect message to Beirut — that a Hezbollah intervention in any U.S.-Iran military exchange would trigger Israeli strikes on Lebanese civilian infrastructure including Beirut's airport. Separately, Hezbollah's new leader Naim Qassem declared last month that the group is "not neutral" in the Washington-Tehran confrontation and would "choose in due course how to act." The U.S. Embassy in Beirut evacuated non-essential personnel as a precautionary measure ahead of anticipated regional developments. A third round of U.S.-Iran nuclear talks is scheduled tomorrow in Geneva.

ASSESSMENT

The LAF incident is almost certainly an Israeli enforcement action against LAF forces probing into areas Israel regards as outside the ceasefire demarcation — not a miscalculation, and not a threshold-crossing escalation. The IDF staying silent is itself the message. You know what you were doing and why you were warned. What's more consequential is the airport warning. Israel is not bluffing about cost imposition on Lebanon as a whole if Hezbollah enters a U.S.-Iran exchange. Qassem's "not neutral" framing is a face-saving hedge that could slide in either direction. Hezbollah has been bled badly, its arsenal is reduced, and its new leadership has no incentive to volunteer for a second round. Lebanese PM Salam said Berri relayed private Hezbollah guarantees of non-intervention. Those guarantees directly contradict Qassem's public statements. Salam himself flagged the contradiction. One channel is lying, and Israel cannot plan around uncertainty about which one. But Iranian pressure may override rational calculation, which is precisely why Israel is drawing the line now, publicly, through Beirut intermediaries, before the shooting starts.

PIJ Confirms Doctors Without Borders Physiotherapist Was a Terror Commander

Palestinian Islamic Jihad's confirmed Tuesday that Fadi al-Wadiya — killed in an IDF airstrike on June 25, 2024 — served as deputy head of PIJ's military manufacturing unit, responsible for rocket development involving electronics and chemistry. The IDF had stated this at the time of the strike. Doctors Without Borders (MSF) had identified al-Wadiya as an employee killed while traveling to provide medical care and condemned the strike as "brutal" and senseless. MSF did not respond to request for comment on the confirmed PIJ designation. The disclosure follows Israel's suspension of MSF's operating license in Gaza under new NGO transparency regulations requiring disclosure of Palestinian and foreign staff, which MSF agreed to provide "as an exceptional measure" in January. PIJ's confirmation comes roughly two months after Israel's Foreign Ministry presented evidence of dual roles held by MSF staffers — including a Hamas sniper, Nasser Hamdi Abdelatif al-Shalfouh, employed simultaneously by the NGO.

ASSESSMENT

MSF has now been contradicted by its own casualty's terrorist organization. Al-Wadiya was developing missiles for a jihadist terror network. One in an open fight with Israel. The IDF killed him. PIJ put him in a martyr poster and named his command role. MSF called it a massacre. At some point the Western humanitarian sector has to reckon with the fact that the vetting failure is systemic, not incidental — that the same organizational culture that produces press releases about "brutal killing" without basic personnel verification is the same culture that resisted Israel's transparency requirements as a threat to neutrality. The neutrality was already gone. Israel's NGO screening rules are not a power grab. They are a security response to a documented pattern. Neither a lab coat nor a press pass is a license to be an operational terrorist. What the MSF model produces, operationally, is a permission structure that embeds combatants inside protected facilities and lets them use their humanitarian employment as a cover story — until they can't.

Inside Israel

Haredi Draft: AG Tells High Court Government Has Produced No Sanctions Plan; Enforcement Intensifies in Parallel

Attorney General Gali Baharav-Miara filed with the High Court of Justice on Tuesday that the government has not formulated a plan to revoke personal economic benefits from Haredi draft evaders, despite evidence that financial sanctions increase compliance rates, and despite a High Court order requiring meaningful enforcement measures within 45 days. As of February 15, declared draft evaders had risen from 2,257 in July 2025 to 16,880, with 22,196 men ordered to report for service. Military prosecutors are revising guidelines to reduce the non-reporting threshold for criminal indictment from 540 to 365 days. Between January 2025 and January 2026, border authorities denied exit to 609 draft-eligible men and arrested 298. Military police carried out 1,240 proactive arrest operations since the November 2025 High Court enlistment ruling. Police meanwhile warned that enforcement operations in Haredi neighborhoods continue to trigger road blockades and riots. The High Court is scheduled to hold a compliance hearing Sunday. Former PM Naftali Bennett separately attacked Likud MKs for coalition loyalty on the Haredi draft bill, pointing out that the same MKs who broke discipline to defeat Smotrich's VAT order could do the same on conscription if the political will existed.

The numbers in today's AG filing aren't new — they're the predictable output of a system that has been running the same stall for years.

ASSESSMENT

The gap between enforcement theater and enforcement reality is widening. Numbers don't lie: 16,880 declared evaders, 1,240 arrest operations, and still no approved sanctions plan. The government is performing compliance for the court while its coalition partners run the clock. Bennett's observation about Likud's selective discipline is correct and embarrassing — they broke ranks on an import tax within hours, but the reservists filling the gaps left by 110,000 yeshiva students don't have a Knesset caucus. The AG's filing is useful, but it has now become a ritual submission acknowledging a ritual non-compliance. What changes the equation is either the court's contempt proceedings, which petitioners have already requested, or an election — at which point the current coalition's survival math inverts. Until then, the IDF keeps rotating exhausted reservists through a war with no real end in sight.

Smotrich Defies Knesset, Signs New VAT Import Order Hours After Previous One Is Killed

Finance Minister Bezalel Smotrich signed a revised order expanding VAT exemption on personal imports from \$75 to \$130 — hours after the Knesset voted 59-25 to revoke his previous \$150-ceiling order, in a notable coalition fracture. Smotrich characterized the opposition bloc as “communists in Likud” fighting against Israeli citizens, and argued the new order was legally distinct from the one revoked. The Knesset Finance Committee is expected to recommend cancellation, triggering another Knesset vote within two months.

Netanyahu had sought to impose coalition discipline before backtracking and allowing a free vote.

ASSESSMENT

Smotrich's plan isn't terrible. Even that he is running a populist cost-of-living campaign through his ministry — against the coalition's own import lobby — isn't past the expected line. What is more important in this is the Knesset revolt —which shows the limits of Netanyahu's ability to enforce discipline on economic legislation in an election year. That's a manageable political fight.

State Comptroller Finds 'Total Disorder' in Post-October 7 Evacuation Response

State Comptroller Matanyahu Englman published the 32nd post-October 7 audit Tuesday, finding “total disorder” and “systemic failure” by the government and IDF in evacuating and absorbing over 210,000 civilians after the Hamas attack. Evacuation of Kibbutz Nahal Oz began 14 hours after Hamas infiltrated. Kibbutz Kfar Aza took 36 hours. Kibbutz Nir Am 20 hours. Mefal-sim 17 hours. A 2022 updated evacuation protocol was never approved due to funding disputes—meaning the government entered the war with a 2012 plan that did not anticipate anything close to the actual scale. Only 41 of 317 facilities used to house evacuees had been pre-designated under Interior Ministry frameworks. Kiryat Shmona — 1 kilometer from the Lebanese border — was not included in the IDF's “Safe Distance” border evacuation plan despite prior audit findings on its vulnerability. Inter-ministerial blame-shifting between the Interior Ministry, National Emergency Authority, and IDF was documented. The Defense Ministry's response argued that its coordination was unprecedented in scope and effective given circumstances.

ASSESSMENT

Thirty-two comptroller reports and the verdict is unchanged: the system failed the people it existed to protect. The 36-hour evacuation of Kfar Aza is a damning record of what happens when the bureaucracy mistakes paper plans for actual preparedness, and when funding disputes cancel the updated plans years before it's needed. The Defense Ministry's self-defense — that it operated “around the clock” — describes activity, not outcomes. The outcomes are in the numbers. What should concern the security cabinet now is the northern exposure. Kiryat Shmona omitted from the Safe Distance plan despite sitting a stone's throw from Lebanon, with 10,000 residents who self-evacuated before the government issued a formal decision. If the next northern escalation happens under an Iran-strike scenario, the civilian infrastructure assumptions need to be stress-tested against the October 7 record. They haven't been.

Israel and the World

Israel's NGO Enforcement Tightens; 17 Groups Petition High Court to Block March 1 License Expiry

Seventeen international aid organizations — including multiple MSF branches, Oxfam, Danish and Norwegian Refugee Councils, Caritas Internationalis, the

American Friends Service Committee, and the International Rescue Committee — petitioned Israel's High Court of Justice Tuesday to block the expiration of 37 NGO licenses set for March 1, warning the terminations “will lead to a humanitarian collapse.” The Diaspora Affairs Ministry required groups to submit documentation including foreign and Palestinian employee names, passport numbers, and identification numbers. Not exactly an onerous task. Yet, 37 organizations declined and received 60-day wind-down notices after licenses expired January 1. COGAT states the affected groups collectively account for less than 1% of total aid entering Gaza and that more than 20 compliant organizations will continue operating. MSF says it has been unable to import supplies including antibiotics and anesthetics since the license dispute began—though they've just admitted they lied about at least one of their staffers being a terrorist, so their credibility isn't exactly at peak levels.

ASSESSMENT

The NGO sector's “humanitarian neutrality” argument collapsed the moment PIJ confirmed that its physiotherapist was building their rocket array on Doctors Without Borders time. That confirmation is the entire context for why Israel's staff-disclosure requirement exists. The refusal to provide employee lists is not a principled stand on data protection law. It is an organizational choice to prioritize operational independence over accountability to the state hosting their presence in an active war zone. COGAT's 1% aid-volume figure dismantles the catastrophe framing. The High Court will likely grant a temporary stay, as it usually does, buying the NGOs weeks and generating another round of international pressure coverage while the substantive security question — how many Fadi al-Wadiyas are in the staff rosters — goes unanswered.

U.S. Embassy to Offer Passport Services in Judea and Samaria; Casten's Ceasefire Compliance Act Introduced with 25 Democratic Co-Sponsors

The U.S. Embassy in Jerusalem announced consular passport services will be provided in Efrat starting February 27 — the first time U.S. consular services have been extended into Judea and Samaria — with follow-on stops planned in Beitar Illit, Haifa, Jerusalem, Netanya, and Beit Shemesh, as part of the “Freedom 250” initiative. Israel's Foreign Ministry called it “historic.” Simultaneously, Rep. Sean Casten (D-Ill.) introduced the Ceasefire Compliance Act with 25 Democratic co-sponsors, which would ban the use of U.S.-origin weapons in Palestinian-administered territories if Israel is found to have violated the October 2025 ceasefire, the Trump Gaza peace framework, or applied sovereignty to Judea and Samaria. The bill is backed by J Street and New Jewish Narrative.

ASSESSMENT

The embassy passport announcement is a deliberate administrative normalization of Judea and Samaria as territory where Israeli residents exist and where the U.S. government serves its citizens — regardless of what their post code is supposed to mean to the international legal order. Its symbolic weight exceeds its operational significance. The Casten bill is the institutional opposite: a lawfare vehicle dressed as oversight, designed to give a future hostile administration a statutory hook for weapon suspensions. Twenty-five Democratic co-sponsors in the current political environment is a message to the base and a marker for the next cycle. The “sovereignty trigger” clause is the tell — it would make Israeli domestic policy decisions about Judea and Samaria into grounds for arms cutoffs, which is exactly the pressure mechanism the left and international NGOs have been trying to create through treaty and court routes for twenty years. At the moment, this bill goes nowhere. That won’t always be the situation.

Yale Data Shows Anti-Zionism and Jew-Hate Structurally Linked; UK Greens Leader Edges Toward “Zionism Is Racism” Motion

The Fall 2025 Yale Youth Poll — a nationally weighted survey of 3,426 American voters — found that among non-Jewish respondents, 41% affirmed Israel’s right to exist as a Jewish state, 24% denied it, and 35% were unsure. Those denying Israel’s right to exist scored nearly three times higher on a composite antisemitism index than those affirming it: roughly 30% vs. 10%. The denial group was significantly more likely to endorse claims of Jewish dual loyalty, to support boycotts of Jewish American-owned businesses, and to agree that Jews hold excessive societal power. The same group was also far more likely to characterize Zionism as racism or apartheid, and to refuse to categorize Nazi comparisons or campus exclusion of Jewish students as antisemitism. Authors Samuel Abrams and Steven Cohen conclude the anti-Zionism/antisemitism distinction is “empirically false.” Separately, UK Green Party leader Zack Polanski stated on Times Radio that he is prepared to vote for a motion declaring Zionism to be racism at the party’s Spring Conference, conditioning his support on the definition of Zionism being “what is happening right now by the Israeli government.” Polanski previously identified publicly as pro-Israel and pro-Zionism while a Liberal Democrat candidate. He now leads a party applying mounting internal pressure to adopt eliminationist positions as ideological litmus tests for membership.

ASSESSMENT

The Yale data does not discover something new. It merely quantifies what anyone paying attention has observed for years. Namely, that the people most likely to deny Jewish national self-determination are the same people most likely to hold classic antisemitic beliefs about Jews in their own country. The researchers treat this as a revelation. What the data does is strip away the dodge — the “I’m not antisemitic, I just oppose Israeli policy” formulation that lets campuses, parties, and HR departments declare the matter closed. A 3-to-1 ratio in antisemitic belief between Israel-deniers and Israel-affirmers is demographic of Jew-hate that has found a laundering vehicle. Polanski is a case study in the political mechanics: a politician who knew what Zionism meant when he needed Jewish votes, and now finds it convenient to “equivocate” when the mob wants its resolution. His mother and sister support Israel and Zionism. His former self did too. The only thing that changed is the political price.

Briefly Noted

Frontline & Security

- **Israel National News:** An indictment is imminent in a Gaza smuggling case involving prohibited goods worth hundreds of millions of shekels, with investigators describing the known transactions as “just the tip of the iceberg” — and a separate probe examining suspected bribery of foreign personnel at the U.S. reconstruction headquarters in Kiryat Gat. The penetration of the American-run reconstruction architecture by criminals and foreign fixers is the specific threat, and “hundreds of millions” suggests an operation too large to be incidental.

Diplomacy & Geopolitics

- **Jerusalem Post:** The Muslim Brotherhood’s center of gravity has shifted from the mosque to TikTok and Telegram, where a new generation of digital preachers reach millions before any government program can react — and Washington, having finally mustered sanctions designations in January 2026, still has no answer for the demand side. France banned organizations. Germany policed content. Britain flagged individuals. the Brotherhood adapted each time because states kept fighting supply while the recruitment offer went uncontested.
- **JNS:** PLO Executive Committee Secretary-General Azzam al-Ahmad stated flatly that Hamas “is not a terror organization,” that the PLO rejects Hamas disarmament, that PA police carrying out attacks on Israelis is something to be proud of, and that U.S. demands for curriculum reform “will not” be accepted. The Trump administration is simultaneously routing Gaza’s transitional governance through PA-linked structures while the PA’s own leadership announces, on the record, that it will do none of the things Washington says it requires. What could possibly go wrong?
- **Israel National News:** A Democratic Party post-2024 autopsy reportedly concluded that the Harris campaign’s failure stemmed partly from insufficient distance from Israel — an analysis that, among other things, ignores that Harris lost Pennsylvania while passing over the Jewish governor most likely to carry it, Josh Shapiro, because he was too pro-Israel for her activist base. The lesson the party is institutionalizing is that the antisemitic vote is worth chasing.

Domestic & Law

- **Times of Israel:** An ADL poll of 3,989 registered New York State voters found 70% support Governor Hochul’s proposed 25-foot buffer zones around houses of worship. The only people opposed are the activist groups whose operating model depends on synagogue-front intimidation, and they, thankfully, are losing the public argument.

Culture, Religion & Society

- **JTA:** Poland's National Broadcasting Council has opened an investigation into "Among Neighbors," a documentary about the 1945 murder of Jewish Holocaust survivors by their Polish neighbors — triggered by a complaint from the Ordo Iuris Institute and backed by a minister in President Nawrocki's office, who called the film "historical anti-Polish manipulation." A Polish law makes it a civil offense to accuse Poland of complicity in Nazi crimes—the documentary chronicles a massacre that occurred six months after the Nazis left.
- **Five Towns Jewish Times:** The Orthodox Union launched OHRBIT, a free AI-powered Torah learning app that personalizes content across hundreds of thousands of hours of OU shiurim and vetted partner material, aimed at young professionals and college students. It's a Spotify-meets-Duolingo architecture applied to Jewish continuity — which, given the campus environment we've documented, is not a luxury.

Developments to Watch

Regional Axis (Iran, Houthis, Militias)

- **Trump Deadline Arrives** — Trump's February 19 ultimatum to Iran expires Friday–Saturday. Eleven U.S. F-22s from RAF Lakenheath have already landed at an IAF base in southern Israel, supported by seven aerial refueling tankers. The decision is now at the White House.
- **U.S. Strike Capacity Ceiling** — An Israeli intelligence official told the Financial Times that the assembled U.S. force can sustain four to five days of intense aerial assault and roughly a week of lower-intensity strikes before exhausting sortie depth.
- **War Powers Vote — Tehran's Free Intelligence** — Reps. Massie and Khanna force a House floor vote next week to restrict unilateral Iran action; if it draws significant Republican support, Iran's negotiating team has a legislative argument that Washington's resolve is time-limited and politically contested.
- **IRGC Live-Fire Exercises** — The IRGC Ground Forces launched military exercises in southern Iran and Gulf islands, including live-fire drills under the IRGC's Madinah Headquarters.

Northern Front (Lebanon / Syria)

- **Hezbollah's Public Contradiction** — Lebanese PM Nawaf Salam said Nabih Berri conveyed private Hezbollah guarantees of non-intervention in a U.S.-Iran exchange; Hezbollah Secretary General Naim Qassem publicly declared the opposite. One of those is a lie. Salam called on Hezbollah not to drag Lebanon into "a new adventure." Which Hezbollah channel is authoritative will be answered by events, not statements.

- **LAF Marjeyoun Post Compliance** — The IDF fired warning shots at Lebanese Armed Forces troops establishing an uncoordinated observation post near Marjeyoun; the LAF reinforced and escalated to UNIFIL. The ceasefire mechanism is now formally engaged on this incident, with U.S. oversight involvement.
- **Syrian Druze Coordinator Activated** — Maj. Gen. Ghassan Alian, former COGAT chief, has been formally appointed as Israel's coordinator for relations with the Syrian Druze as U.S. forces complete withdrawal from Syria within a month. The role is new; the threat to the Druze from Damascus-backed forces and jihadist elements in southern Syria is not.

Gaza & Southern Theater

- **NCAG Legitimization Window Closing** — The U.S.-backed National Committee for the Administration of Gaza is moving toward operational status while Hamas military commanders are already documented inside its structure.
- **NGO License Expiry — High Court Stay Imminent** — Thirty-seven NGO licenses expire March 1; seventeen groups have petitioned the High Court, which will almost certainly issue a temporary stay. The stay buys the NGOs weeks and generates an international pressure cycle.

Home Front & Politics

- **Haredi Draft Compliance Hearing Sunday** — The High Court holds its compliance review Sunday; the AG has already told the court no economic sanctions plan exists, petitioners have requested contempt proceedings, and declared evaders have jumped from 2,257 to 16,880 in seven months. The court's response — whether it moves to contempt or issues another deadline — determines whether the coalition's stall tactic survives another quarter.
- **Smuggling Indictment Landing Soon** — An indictment in the hundreds-of-millions-of-shekels Gaza smuggling case is described as imminent, with the broader investigation reaching into the U.S. reconstruction headquarters at Kiryat Gat. The journalist covering it called the current exposure "the tip of the iceberg." When it lands, it hits the aid architecture, criminal networks, and the American-run reconstruction apparatus simultaneously.

What hardened today: the U.S. force posture fully crossed from pressure instrument to pre-strike architecture, and Trump's stated deadline arrives before the weekend. **What cracked:** Hezbollah's public and private assurances are now openly contradictory, the PLO's lack of reformability is a matter of formal record rather than ongoing debate, and the Israeli coalition's ability to enforce discipline on anything consequential remains unproven. **What shifted:** the smuggling indictment, when it lands, reaches into the U.S.-run reconstruction apparatus — meaning the accountability problem in Gaza governance runs through American-managed infrastructure, not just Hamas.

The next few days will answer whether Trump's ultimatum was a fuse or a prop. Every actor in the region has already placed their bet.

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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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