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READER EDITION

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ISRAEL BRIEF

Thursday, March 12

Iran claims coordinated fire with Hezbollah for the first time. The Strait of Hormuz becomes even more contested. Israel warns Lebanon: act on your promises or lose your infrastructure.

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THE BOTTOM LINE Thirteen-to-zero at the Security Council with Russia and China unable to do more than abstain represents diplomatic equivalence to Iran standing alone. Moscow attempted laundering the vote into a generic anti-violence resolution and couldn't find five supporters. Beijing chose silence over solidarity. The 135-country co-sponsorship is a figure designed for citation in all future diplomatic filings. The GCC drafted this resolution establishing legal and political record: Iran attacked sovereign Arab states that explicitly declared neutrality, struck civilian areas, and killed and injured citizens from dozens of nations. This record forms the foundation for whatever follows—expanded sanctions, reparations claims, or regional defense architecture already under construction in real time.

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The War Today

Iran and Hezbollah Coordinate First Joint Strike; CENTCOM Passes 5,500 Targets; Israel Strikes Nuclear Site

The Islamic Revolutionary Guard Corps announced its ballistic missile barrage against Israel represented “a joint and integrated operation” with Hezbollah—marking the first public declaration of synchronized fire since the conflict began. Concurrent with Iranian missiles, Hezbollah launched drones and rockets targeting over 50 Israeli locations. All Iranian ballistic missiles were intercepted; no significant casualties resulted from multiple Iranian salvos following midnight. CENTCOM confirmed striking more than 5,500 targets throughout Iran, destroying the final Soleimani-class warship and hitting a major ballistic missile manufacturing facility overnight. The IDF targeted a Tehran compound previously used for advanced explosives development connected to Iran’s nuclear weapons program from the 2000s, noting Iran had recently rehabilitated the site. Additional Israeli airstrikes hit IRGC command centers, Interior Security and Basij bases across Tehran, killing approximately 10 security personnel according to Iranian media. Iranian leadership responded with internal crackdowns: Police Chief Ahmadreza Radan declared that “anyone who takes to the streets at the request of the enemy will be treated as an enemy, not as a protester,” and ordered border guards to respond to aggression with gunfire. The Intelligence Ministry announced arresting an armed group allegedly linked to the U.S. and Israel. The IRGC detained three additional individuals for “disturbing public opinion” and cooperating with “enemy media.” President Trump told Axios that “There’s nothing left to target in Iran” and that he could end operations whenever desired. However, U.S. and Israeli officials indicated no decision to cease operations has been made, with planning assuming at least two additional weeks of strikes.

ASSESSMENT

The analytical tension is between Trump’s rhetorical “nothing left to target” narrative and his military’s two-week operational planning window. CENTCOM, the IDF, and intelligence communities continue executing target lists. The acknowledgment that regime change was never a military objective is operationally honest and politically necessary before public questions arise about leadership succession. Iran’s aggressive internal security posture—including shoot-on-sight orders and “enemy media” arrests—reveals the regime perceives domestic unrest as a graver threat than airstrikes alone. Israeli drone strikes killing approximately 10 security personnel and attributed by Iranian media to “joint Mossad and monarchist” operations suggest internal destabilization campaigns run parallel to aerial bombardment.

Hormuz Transforms Into Combat Zone; Iran Attacks Shipping; Global Strategic Reserves Opened

U.S. forces destroyed 16 Iranian mine-laying vessels near the Strait of Hormuz, with Trump claiming 58 total Iranian naval vessels sunk, including 31 minelayers. Iran’s explosive-laden boats attacked two fuel tankers in Iraqi

territorial waters—the Marshall Islands-flagged Safesea Vishnu and Malta-flagged Zefyros—igniting both and killing one crew member. The Thailand-flagged Mayuree Naree sustained projectile strikes while transiting the strait; three crew members remain missing with 20 evacuated to Oman. The Revolutionary Guards claimed responsibility for the Mayuree Naree engagement, marking the first direct attack by Guards forces against a commercial vessel. Additional commercial vessels sustained damage: the Japan-flagged ONE Majesty and the Marshall Islands-flagged Star Gwyneth. Iranian drones struck Oman’s largest oil storage facility at the Port of Salalah and injured four people near Dubai International Airport. Saudi Arabia intercepted four drones in its eastern region; Kuwait destroyed eight. Tanker traffic through the Strait collapsed from approximately 50 daily transits before February 28 to zero after March 8. Crude oil reached \$113.13 per barrel. U.S. gasoline prices increased over 55 cents per gallon since March 1, averaging \$3.53. The International Energy Agency authorized releasing 400 million barrels from strategic petroleum reserves across 32 member nations—the largest coordinated drawdown in history. A senior Iranian military official told Al Jazeera that “another strait” could face equivalent treatment.

ASSESSMENT

Iran is publicly acknowledging direct attacks on civilian commercial vessels. The IEA’s 400-million-barrel release represents the energy establishment’s panic response, indicating the market has priced in weeks of disruption. Iran’s threat to target all regional ports if its own face threats represents mutually assured economic destruction—except Iran’s ports are already burning while Gulf states’ remain intact. The Guards are lashing out because their naval capability faces systematic elimination. Their strategy aims to make transit costs sufficiently high to pressure Washington to cease operations. This represents a race Iran is losing, though gradually enough to matter.

Hezbollah Announces “The Devouring Wind” Operation; Israel Prepares Broad Lebanon Campaign

Hezbollah announced operations under “Operation Al-Asf al-Ma’kul” (The Devouring Wind) and fired 150+ rockets and approximately 20 drones toward northern Israel on Wednesday night, triggering alerts from Kiryat Shmona to Haifa. Several long-range rockets struck open areas; a Lower Galilee village of Bi’ina sustained a direct residential hit. Three people sustained light injuries across the north. The IDF responded with large-scale strikes: 10 terror structures in Beirut’s Dahieh district within 30 minutes, including Radwan Force headquarters, intelligence headquarters, and command centers. The IDF reported striking over 70 Dahieh targets since the war’s start. The IAF and ground forces dismantled dozens of ready-to-fire launchers. The IDF’s Arabic-language spokesperson issued a third evacuation warning for southern Dahieh. A senior Israeli security official told i24 News: “They have left us no choice—this campaign must expand into Lebanon. There is no one to talk to on the other side. We are considering strikes on Lebanese government infrastructure.” Chief of Staff Zamir ordered the Golani Brigade transferred from Gaza to the northern front. Troops from the 7th Armored Brigade under the 36th Division raided the Rab al-Thalathine area in southern Lebanon.

IDF intelligence assesses that Hezbollah calculated confrontation serves its interests—forcing comprehensive ceasefire and ending Israel’s Lebanon enforcement freedom. A senior Israeli official stated: “Hezbollah wants to create a new equation in which Israeli enforcement policy in Lebanon stops entirely and we no longer strike. That will not happen. Therefore, the entire situation is heading toward serious escalation.” The IDF had prepared a major surprise operation against Hezbollah leadership and rocket infrastructure in recent months, but political leadership postponed the plan twice. When the Iran war commenced, most aircraft, drones, and strike units were allocated to Iran—the more critical theater—and Israel lost operational surprise. Hezbollah has shifted to guerrilla tactics: small units, eliminated electronic communications, conserved anti-tank rockets.

ASSESSMENT

Hezbollah’s calculation is transparent: escalate to force Israel into a two-front resource dilemma, betting that northern front costs will pressure Jerusalem toward enforcement-for-quiet negotiations. The IDF’s response—Dahieh operations at scale, three divisions deployed, Golani movement northward—indicates the gambit is not succeeding. However, the twice-postponed surprise operation represents uncomfortable truth: Israel’s political leadership deferred the Lebanon operation when executable on Israel’s terms, and now confrontation follows Hezbollah’s schedule with fewer available assets. The demand that the Lebanese Army act against Hezbollah—paired with infrastructure strike threats—constitutes a final warning. Lebanon’s government banned IRGC activity and committed to Hezbollah disarmament this week; Israel now demands proof this wasn’t merely a press release.

Inside Israel

Cabinet Approves NIS 30 Billion Defense Increase and NIS 5 Billion Coalition Allocation in Wartime Budget

The cabinet approved an amended 2026 state budget late Tuesday, adding approximately NIS 30 billion to defense spending for Operation Roaring Lion and setting aside NIS 13 billion in reserves for extended defense and civilian needs. The deficit target rose to 5.1% of GDP. Over NIS 5 billion in coalition funding was approved—including NIS 1.269 billion in 2026 for Torah institutions—with hundreds of millions directed to Haredi institutions, reallocated from other government ministries. The Bank of Israel issued sharp criticism, warning that economic activity damage “could be even more severe” than the Finance Ministry’s 0.5% GDP estimate, and debt-to-GDP ratios may reach 70% in 2026, up from roughly 60% pre-war. The central bank called for coalition budget reductions and tax incentive cuts. Prior to the vote, Netanyahu and Smotrich announced the Haredi draft bill would be shelved during wartime “for unity,” and Smotrich’s dairy reform was entirely detached from the budget. The budget passed its first Knesset reading and must clear final votes before month’s end or trigger automatic Knesset dissolution. Opposition leader Lapid called the NIS 5 billion allocation “the most corrupt kind of political bribery for the Haredi parties,” while MK Beliak told the Finance

Committee the government was allocating “large sums to draft evaders” during wartime.

ASSESSMENT

Coalition mathematics appear visible in every budget line. Netanyahu secured Haredi votes by killing the draft bill and writing a NIS 1.269 billion check to Torah institutions—during a war where the IDF publicly warned of significant manpower shortages and the Golani Brigade shuffles between theaters. The Bank of Israel’s intervention is unusually blunt: it deemed the tax-bracket adjustment “inconsistent” with fiscal need and flagged the coalition reserve as potential future misuse before spending occurs. While 5.1% deficit and 70% debt-to-GDP figures aren’t crisis-level globally, Israel entered this conflict as a small, open economy maintaining fiscal discipline specifically to absorb such shocks. That margin is being consumed—partly by warfare, partly by coalition maintenance. The March 31 budget deadline represents a sword suspended overhead: missing it dissolves the Knesset. This timeline gives every coalition partner leverage and the prime minister zero room for refusal.

Pardons Department Rejects Netanyahu Request; Denies Meeting Legal Criteria

The Justice Ministry’s pardons department completed its legal position paper, determining that Prime Minister Netanyahu’s pardon request fails to meet relevant conditions—primarily because his trial remains ongoing, no conviction exists, and he neither admitted guilt nor expressed remorse. The High Court previously ruled that pre-conviction pardons are theoretically possible only when the petitioner admits underlying conduct, creating a de facto conviction. Heritage Minister Amichay Eliyahu—delegated by Justice Minister Levin to manage the process due to Levin’s potential conflict—responded by asserting the request “merits consideration” and announced “in-depth consultations” before forwarding his recommendation to President Herzog. President Trump has applied substantial pressure on Herzog to grant the pardon. Herzog stated he will decide free of external influence.

ASSESSMENT

The pardons department performed its function and arrived at the predictable legal conclusion: without conviction and admission of guilt, existing precedent renders a pardon nearly impossible absent legal reinterpretation no bureaucratic official will volunteer. The real question has never been legal—it is fundamentally political. Eliyahu’s “in-depth consultations” represent a transparent effort to draft covering language reframing the request in terms the president can employ. Herzog will receive three documents: one declining, one suggesting possibility, and counsel from his own legal adviser. External pressure—Trump’s most visibly—introduces a variable no precedent addresses. Whether resolution comes through pardon, acquittal, or exhaustion now depends on presidential resolve, not prosecutorial merit.

Kiryat Shmona Residents: Eleven Days Underground; Previous Promises Unfulfilled

Kiryat Shmona Mayor Avichai Stern told 103FM that remaining residents have sheltered underground for 11 days “in shared shelters, with children” and doubts their endurance can continue. Stern appealed directly to Jerusalem

decision-makers: “Finish this as quickly as possible. Not to end the war, but to end Hezbollah.” He stated that Home Front Command guidelines instructing businesses to operate normally represent “a fiction.” Stern highlighted the gap between past commitments and present circumstances. He asked: “Who is shooting at us if Hezbollah is not south of the Litani River?” In Moshav Liman—less than two miles from the Lebanese border—families who returned after 14 months of displacement face renewed fire. The moshav lost Staff Sgt. Or Demry ז”ל this week. Schools remain closed across the north. Northern residents are calling for establishing a “Yellow Line” buffer zone extending to the Litani River under exclusive IDF control, modeled on the Gaza security perimeter.

ASSESSMENT

Stern’s question—“Who is shooting at us if Hezbollah is not south of the Litani?”—undermines public trust while remaining perfectly justified. The answer is that Hezbollah rebuilt faster than anyone publicly acknowledged. Ceasefire enforcement supposed to prevent precisely this scenario failed to deliver. Kiryat Shmona and Moshav Liman residents have now been displaced twice, lost soldiers from their communities, and face pressure to reopen businesses while sheltering. Home Front Command guidelines are fiscal calculations disguised as operational guidance. The Yellow Line proposal expresses northern communities’ message: diplomatic arrangements no longer deserve their trust. They observed UNIFIL fail, Resolution 1701 fail, and the ceasefire fail. Jerusalem must demonstrate the decency not to disappoint them further.

Israel and the World

Spain Permanently Withdraws Ambassador; Lebanon Seeks Direct Negotiations; Gulf States Champion Historic UN Resolution

Spain permanently withdrew its ambassador to Israel on Wednesday—terminating Ambassador Ana Maria Salomon Perez’s posting rather than merely recalling her for consultations—leaving its Tel Aviv embassy under chargé d’affaires leadership indefinitely. Sa’ar accused Spain of “standing with tyrants” for opposing Iran operations. President Trump told reporters Spain has been “terrible” and threatened to stop doing business with them. Conversely, Lebanon’s civilian government now seeks direct negotiations with Israel—a shift driven by Hezbollah’s diminished capacity and the regime’s severing from Iranian direction. Lebanese authorities outlawed Hezbollah military activity, committed to comprehensive disarmament, and announced IRGC operative detention and ended visa-free entry for Iranian nationals. A Bahraini observer stated normalization with Israel could accelerate—“especially as destabilizing players disappear.”

ASSESSMENT

Two simultaneous realities occupy the same week. Spain formalized what was already operationally true: no diplomatic relationship exists, just a Tel Aviv mailbox. The Trump-Sa'ar alignment against Madrid increases costs but won't likely reverse Spanish posture. Sanchez has transformed this into a domestic identity issue rather than strategic consideration. Meanwhile, direct Jerusalem-Beirut negotiations—even at the intent level—would have been unthinkable 18 months ago. Hezbollah's degradation created political space; Iran's inability to resupply or direct its franchise created opportunity. Whether Lebanon's government can translate declared intent into enforceable action constitutes the critical test.

Gulf States Lead Historic UN Resolution Condemning Iran; 13-0 Vote, 135 Co-Sponsors

The United Nations Security Council voted 13-0 on Wednesday—with Russia and China abstaining—to condemn Iran's strikes on Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the United Arab Emirates, and Jordan since the war outbreak. The Bahrain-drafted, Gulf Cooperation Council-backed resolution won co-sponsorship from 135 UN member states, the highest number in Security Council history. The resolution condemned Iran's attacks on "residential areas" and "civilian objects," demanded immediate strike cessation, and condemned Strait of Hormuz closure threats. U.S. Ambassador Mike Waltz called attacks on civilian infrastructure "disgusting." Russian Ambassador Vassily Nebenzia stated discussing attacks "in isolation of the root causes" was "impossible." Israeli Ambassador Danny Danon noted the regime is "firing on the countries of the region out of desperation."

ASSESSMENT

Thirteen-to-zero at the Security Council with Russia and China unable to do more than abstain represents diplomatic equivalence to Iran standing alone. Moscow attempted laundering the vote into a generic anti-violence resolution and couldn't find five supporters. Beijing chose silence over solidarity. The 135-country co-sponsorship is a figure designed for citation in all future diplomatic filings. The GCC drafted this resolution establishing legal and political record: Iran attacked sovereign Arab states that explicitly declared neutrality, struck civilian areas, and killed and injured citizens from dozens of nations. This record forms the foundation for whatever follows—expanded sanctions, reparations claims, or regional defense architecture already under construction in real time.

Briefly Noted

Frontline & Security

- The FBI alerted California law enforcement to intelligence regarding Iran considering launching drones from a vessel off the U.S. West Coast if American military strikes occurred—a bulletin distributed in late February lacking specifics on timing, targets, or personnel. Iran maintains Mexican presence and drone technology access.

- A cyberattack on Israeli railway station screens Wednesday night displayed fake Hebrew-language warnings of incoming Iranian missiles, instructing passengers to evacuate the “subway” immediately. Israel Railways confirmed the breached advertisement screens lack connection to critical infrastructure.
- Norwegian police arrested three brothers—Norwegian citizens of Iraqi origin in their 20s—for Sunday’s IED bombing at the U.S. Embassy in Oslo, which damaged the consular entrance without causing injuries. Europe’s Iran-linked threat environment gained another data point.

Diplomacy & Geopolitics

- Palestinian Authority TV claimed Israel’s wartime ban on gatherings exceeding 50 people enabled an extremist Jewish Passover sacrifice at Al-Aqsa—a fabrication Palestinian Media Watch called “the worst terror incitement.” The PA framed it as a “political and ideological process seeking to change the religious, historical and legal reality” of the Temple Mount—a recycled incitement formula engineered to trigger violence, deployed on Ramadan schedule.

Domestic & Law

- COGAT ordered testing of up to 100% of Palestinian Authority agricultural produce entering Israel after inspections found 50% of cucumbers, 49% of tomatoes, and 66% of hot peppers contaminated with prohibited pesticides—including organophosphate neurotoxins. MK Sohn Har-Melekh said the system “preferred the livelihood of our enemies over the health of Israel’s citizens.”
- Haredi groups in Britain are preparing legal challenges to the Children’s Wellbeing and Schools Bill, which would require unregistered yeshivot to register with the Department for Education and undergo Ofsted inspections. The British Rabbinical Union called the bill “disproportionate and unlawful interference” with religious parenting rights [though Torah itself expects learning a trade alongside Torah study—not one at the other’s expense].

Economy, Tech & Infrastructure

- Google completed its \$32 billion acquisition of Israeli cybersecurity firm Wiz—the largest-ever acquisition of an Israeli company—with each of four founders receiving approximately \$2.2 billion after tax. The state will collect roughly NIS 10 billion in capital gains by mid-April.
- The U.S. Justice Department is investigating whether Iran used the Binance cryptocurrency exchange to evade sanctions, following an internal Binance probe identifying over \$1 billion in flows connected to networks funding Iran-backed terror groups.

- Iran's new Supreme Leader Mojtaba Khamenei financed London luxury property purchases—a mansion and 12 houses on “Billionaires’ Row”—with a £36 million loan from a company ultimately owned by Israeli-born British businessmen Sol and Eddie Zakay of the Topland Group, originally from Ramat Gan.

Culture, Religion & Society

- The Oscar-nominated “Voice of Hind Rajab”—set entirely in Ramallah, never showing Gaza, Israeli soldiers, Hamas, or battlefield conditions where the child died—erases every contested fact while rendering Israelis as a faceless, voiceless purely evil force. Two of five Best International Feature shortlist films center on Palestinians. Independent analysis documented multiple unresolved inconsistencies the film and reviewers decline addressing.
- The 25th Sydney Biennale—taxpayer-funded, Qatar-sponsored, directed by Emirati princess Hoor Al-Qasimi [whose father called Zionism “a cancerous growth”]—opens Saturday with over half of 83 artists being Arab or Muslim and zero Israelis.
- CNN framed two ISIS-inspired suspects who threw explosive devices at a New York rally as “teenagers” whose “normal day” was “drastically changed”—then deleted the post and issued corrections only after public backlash. Anchor Abby Phillip also misreported that bombs targeted Mayor Mamdani rather than his critics—the red-green alliance’s media operating as expected.
- NYC Mayor Zohran Mamdani—whose wife liked posts celebrating October 7 and denying Israeli women’s rape, and who hosted Hamas cheerleaders at Gracie Mansion during Ramadan—spent the week deflecting Islamist bomb-attack blame onto the peaceful protesters who were intended targets. Pennsylvania Governor Josh Shapiro, himself a Passover firebombing target, called Mamdani with sympathy—measuring how effectively victimhood narratives launder themselves even to those understanding better.

Developments to Watch

Regional Axis (Iran, Houthis, Militias)

- Iran declared an end to its mutual-strikes doctrine, pledging continuous fire forward. The IRGC Aerospace Forces warned of “new surprises.” However, rhetoric has outpaced capability for days.
- Iran’s police chief declared anyone taking streets “at the request of the enemy” will be treated as combatants, not protesters, ordering border guards to fire on aggression.

- The New York Times and Israeli officials confirmed the new Supreme Leader was injured—possibly in the legs—on February 28. A wounded leader whose father was just killed, issuing orders from unknown locations, while the Assembly of Experts hasn't properly formalized succession—fragility compounding fragility.
- Kurdish resistance figures claim some fighters are already inside the Islamic Republic and “ready to go into action,” with a border-area fighter saying the regime “has never been weaker.”
- No new Houthi activation reporting, though Israeli intelligence assesses the Houthis are using restraint to lull Israel.
- Iranian drones struck Oman's largest oil storage facilities at the Port of Salalah. Hitting Muscat's oil infrastructure—alongside UAE airport strikes and Saudi drone intercepts—eliminates pretense that Iran is targeting only U.S. and Israeli interests.

Northern Front (Lebanon / Syria)

- Israel told Beirut that without Lebanese Army action against Hezbollah, strikes on national infrastructure follow. Lebanon's government has 48 hours of good intentions and no enforcement mechanism. [LIKELY TO ESCALATE]

Home Front & Politics

- Budget deadline: March 31. The amended budget passed cabinet but must clear final Knesset votes before month's end or trigger automatic dissolution. The Haredi draft bill is shelved, dairy reform detached, and the coalition's NIS 5 billion sweetener is baked in—but any partner calculating the war's political arc differently than Netanyahu can pull the plug with a single no vote.

Closing Reflection

IRAN claimed coordinated attacks with Hezbollah, fired on a cargo ship while admitting responsibility, threatened every regional port, and ordered police to shoot protesters. The IEA opened the largest strategic reserve draw-down in history because the market concurs. Israel now faces two declared fronts, a budget held together by coalition arithmetic, and a northern population promised different reality three times and receiving the same situation. Whether Hezbollah's “Devouring Wind” meets an Israeli ground campaign or another deferred decision—that question will answer itself in days.

Shabbat shalom!

Postscript: Tomorrow at 7:30 a.m. Eastern, “The Machinery of Selective Outrage”—explaining why organizations shutting down universities over Gaza went silent while Iran massacred tens of thousands, then reactivated defending the regime from consequences.

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