



Forensic intelligence for those who act.

READER EDITION

March 25, 2026

ISRAEL BRIEF

Wednesday, March 25

Washington deployed paratroopers and a ceasefire framework on the same day. Tehran rejected both. Jerusalem sent Dermer to protect its interests.

◇ URIEL ZEHAVI

THE BOTTOM LINE El-Sayed's internal call is worse than the public statement which was already bad — a five-paragraph “Imagine” exercise that converted a terrorist attack on a preschool into an indictment of Israeli military operations. To his voter base, speaking against a synagogue bombing costs you something. That is the state of the Michigan's Democratic primary — and it is the environment producing candidates for the United States Senate. Newsom's backtrack is structurally identical: withdraw the word, keep the frame. He is running for 2028, and “apartheid” polls badly for a general election, but the underlying critique — Netanyahu, settlements, far-right coalition — polls well in a Democratic primary. The HAYI campaign in Europe has now hit Belgium, the Netherlands, the UK, and claimed operations in at least five countries. Two minors torched the car in Antwerp. The operational profile is radicalizing younger, decentralizing faster, and operating with enough Telegram infrastructure to claim attacks across borders within hours. This is a terror campaign with a social media distribution network and it was enabled by political maneuvering much like we are now seeing in the United States.

CLASSIFICATION

Reader Edition

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TWO competing signals are emanating from Washington — and neither cancels the other. Trump suspended energy strikes and floated a 14-point framework that reads like a maximalist opening bid dressed as a peace offer. Simultaneously, the Pentagon ordered the 82nd Airborne to the Middle East, keeping a ground seizure of Kharg Island live. Tehran rejected all talks. Jerusalem dispatched Dermer to block a bad deal. And while the diplomatic theater played out, Iran put cluster munitions into Bnei Brak, a woman was killed by a Hezbollah rocket near Mahanayim, and Lebanon's government is trying to expel an Iranian ambassador that Hezbollah told to stay.

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Flash Brief

- **Ceasefire framework vs. 82nd Airborne:** Trump floats 14-point deal requiring zero enrichment and full proxy dismantlement; Pentagon simultaneously deploys 3,000 paratroopers to the region; Tehran flatly denies any negotiations; Dermer flies to Washington to try and block a “not good” deal. *See The War Today.*
- **Cluster munitions in central Israel:** Iranian ballistic missile disperses submunitions across Bnei Brak — nine wounded including six children; separate missile penetrates Tel Aviv air defenses after multiple failed interception attempts. *See The War Today.*
- **IRGC fracturing:** IDF reports Iranian absenteeism and refusal to deploy at launch sites; missile cell responsible for Arad strike eliminated. *See The War Today.*
- **Security zone declared to the Litani:** Katz formalizes IDF control of southern Lebanon; all Litani bridges destroyed; Smotrich calls the river Israel’s new border. *See The War Today.*
- **Gulf states align for war:** MBS urges Trump to continue until regime change; Saudi air bases open to U.S.; UAE freezes Iranian assets; Bahrain drafts UNSC resolution authorizing force in Hormuz; first Gulf military casualties confirmed. *See Israel and the World.*
- **Lebanon expels Iranian ambassador — Hezbollah says no:** Foreign ministry orders Sheibani out by Sunday; Berri and Hezbollah tell him to stay; France pushes direct Israel-Lebanon talks. *See Israel and the World.*
- **Pardon fight escalates:** Eliyahu submits position paper backing Netanyahu pardon; pardons department says criteria not met. *See Inside Israel.*
- **Knesset sprints before recess:** Unpaid leave law passes first reading with 70/100 private-public split; settlement tax benefits advance 37–33; NIS 850B budget vote Thursday; cyber law stalled until 2027. *See Inside Israel.*
- **111 drones seized near Nablus:** Border Police raid store in Kafr Qallil; seizure follows November drill that proved IDF forces in Judea and Samaria cannot counter UAVs. *See Inside Israel.*

Below: what Hezbollah’s refusal to let the Iranian ambassador leave tells you about who actually governs Lebanon, the pardon position paper that contradicts its own ministry, and the 111 drones in a Nablus store that no one is connecting to a failed November exercise.

Trump’s 14-point framework demands everything Iran has spent 46 years building. Tehran’s rejection was categorical. But, “the markets” give *some* credit for his attempt. The 82nd Airborne’s deployment order says Washington knew that Tehran wasn’t up for an easy yes. What connects the cluster munitions in Bnei Brak, the blown Litani bridges, the Gulf military casualties in Bahrain, and the Knesset racing through wartime legislation before a month-long recess is a single underlying condition: every actor is positioning for a war that lasts through Passover — and possibly well beyond it.

The War Today

Trump Floats a Ceasefire Framework While the Pentagon Deploys the 82nd Airborne

President Trump announced “productive conversations” with Tehran and suspended strikes on Iranian energy infrastructure, framing the pause as a test of a diplomatic opening. Simultaneously, the Pentagon ordered deployment preparations for a brigade combat team from the 82nd Airborne Division — roughly 3,000 paratroopers plus divisional headquarters — to the Middle East, with a written order expected within hours. The deployment keeps a ground seizure of Kharg Island, Iran’s main oil export terminal, on the table. The 82nd’s Immediate Response Force can be anywhere on earth within 18 hours but arrives without armor, which would require follow-on reinforcement by the 31st Marine Expeditionary Unit (which is already en route). Presidential advisors Kushner and Witkoff are pursuing, with Trump’s consent, a month-long ceasefire framework broadly similar to structures used in Gaza and Lebanon. The reported 14-point outline requires Iran to dismantle all nuclear capabilities, surrender enriched material to the IAEA on a defined timetable, decommission and destroy Natanz, Isfahan, and Fordow, abandon its proxy network, and keep the Strait of Hormuz open as a free maritime zone. In return, all sanctions would be lifted and the threat of snapback removed. Missile restrictions — limits on quantity and range — would be deferred to a later phase. Trump told reporters Iran had sent “a gift” related to oil and gas, not nuclear matters, and described it as proof the U.S. was “talking to the right people.” Iran’s Foreign Ministry flatly denied any negotiations: “Iran maintains its position rejecting any form of negotiations before achieving its war objectives.” Gulf sources confirm that Tehran refuses to engage with Witkoff or Kushner — accusing both of orchestrating the opening strikes while sitting across the table for nuclear talks — but is open to Vice President Vance, whom Iranian officials view as skeptical of the campaign. Netanyahu responded with a Hebrew video statement vowing Israel would “continue to strike in both Iran and Lebanon” and dispatched Ron Dermer to Washington to deter a “not good” deal. Israel’s top priority: physical removal of Iran’s 440 kg of highly enriched uranium — enough, by Tehran’s own boast to Witkoff, for 11 bombs. Defense Secretary Hegseth stated: “We negotiate with bombs.”

ASSESSMENT

The framework reads like something between a fever dream and a maximalist opening bid rather than a settlement — zero enrichment, full proxy dismantlement, IAEA carte blanche, Hormuz as a free zone — with the sweetener of total sanctions relief. Tehran’s public rejection was immediate and categorical. Dermer’s emergency trip confirms that Jerusalem read Trump’s pause not as strategy but as risk — the third time in a year Washington has moved toward a deal that could freeze Israeli operations before their objectives are met. The gap between what the framework demands and what Iran can accept is wide enough that the real function may be theatrical: give Gulf allies and markets a diplomatic beat, keep the military track live, and see whether internal Iranian pressure — morale collapse in the missile corps, Vance as a preferred interlocutor — produces a back channel that matters. If Trump’s April 9 sharpie-on-calendar is genuine however, Israel has only two weeks to lock in irreversible gains on enrichment, launchers, and Hezbollah infrastructure before Washington decides the war is over.

Cluster Munitions Hit Central Israel as IRGC Missile Units Fracture

At least one ballistic missile carried a cluster warhead into central Israel, dispersing submunitions across Bnei Brak — wounding nine, including a 23-year-old man in moderate condition and six children — with additional bomblets striking Petah Tikva without casualties. Separately, a conventional-warhead ballistic missile penetrated air defenses and struck Tel Aviv after multiple failed interception attempts. Four civilians were lightly injured and several residential buildings sustained extensive damage. The IDF confirmed the missile type had been intercepted before and launched an investigation into the defense failure. In the north, a woman in her 30s was killed near Mahanayim Junction by a Hezbollah rocket — the latest fatality on a front that has been steadily escalating. In the Negev, interceptor fragments struck a mobile home in an unrecognized Bedouin community, injuring three — a man in his 40s, a 26-year-old woman, and a two-month-old infant. Home Front Command restrictions cover the entire country, with educational activities fully prohibited in higher-risk areas including the confrontation line, northern regions, Haifa, central districts, Jerusalem, and the south through Eilat; gatherings capped at 50 people outdoors; and beaches closed nationwide. The government is preparing to approve the mobilization of 400,000 reserve soldiers by the end of May. On the offensive side, the IAF has now conducted over 600 sorties against Iran's ballistic missile infrastructure, and the IDF confirmed it eliminated the missile cell responsible for the Arad strike that collapsed four apartment buildings on Saturday. IDF intelligence reports low morale, fatigue, and absenteeism across IRGC ballistic missile units — personnel are refusing deployment to launch sites after weeks of systematic targeting. Iran's daily launch rate has dropped from roughly 90 on day one to approximately 10, but the cluster munition and interception failures demonstrate that a diminished threat is not a neutralized one.

ASSESSMENT

Iran has been losing its launcher fleet — 330 of 470 destroyed — so it is compensating with payload innovation: one missile, multiple impact points, harder to defend against, higher civilian exposure. A 92% success rate still produces residential buildings with holes in them. The Bedouin community in the Negev — no shelters, no safe rooms, injuries to a two-month-old — is the domestic consequence of decades of unresolved policy on unrecognized villages meeting a war that does not distinguish between recognized and unrecognized addresses. The 400,000 reserve call-up signals the government expects this to run well past Passover. The IRGC's morale collapse is real but insufficient. Missile units that are falling apart can still fire cluster munitions into population centers. Until the launcher count reaches zero and the enriched uranium physically leaves Iran, the home front remains exposed.

IDF Declares Security Zone to the Litani as Lebanon Operations Expand

Defense Minister Israel Katz declared on Tuesday that the IDF will control a security zone in southern Lebanon up to the Litani River until the Hezbollah threat is eliminated — and that displaced residents south of the river will not return until security conditions are met. Finance Minister Smotrich

went further, telling his Religious Zionism faction that the Litani should become Israel's "new border," analogous to the Yellow Line in Gaza and the buffer zone on the Hermon. On the ground, Golani Brigade forces under the 36th Division eliminated eight armed terrorists in close-quarters engagements in southern Lebanon, including a Radwan Force sniper, and dismantled an underground shaft containing anti-tank rockets, Kalashnikov rifles, machine guns, and grenades. The Mountains Brigade located a Hezbollah tunnel shaft and destroyed a weapons compound in the Mt. Dov area. The Israeli Navy eliminated Muhammad Ali Kourani, an IRGC Quds Force operative in Beirut who was advancing terror attacks directed by Iranian intelligence — a strike based on Shin Bet intelligence that underscores Tehran's continued operational presence on Lebanese soil. The IAF struck Hezbollah command centers in Dahieh and At Tiri — the latter embedded inside the Al-Nour radio station — and hit Al-Amana gas stations across Lebanon, a Hezbollah-controlled fuel network generating millions in revenue for the organization. An infantry battalion originally slated for Lebanon has been diverted to Judea and Samaria following an increase in violence, and an IDF soldier was moderately wounded during operations in southern Lebanon by shrapnel in an incident unrelated to enemy fire.

ASSESSMENT

Katz's declaration formalizes what has been operationally true for weeks: Israel is reoccupying the strip south of the Litani that it left in 2000 — the same territory that became Hezbollah's provincial stronghold and launch platform. The bridges are down. The crossings are controlled. The displaced population is not coming back. Smotrich's Litani-as-border language is political positioning, but it lands differently when every bridge is rubble and the defense minister is on the record. The operational discovery of Radwan operatives who entered from the Beqaa at the start of the war — reported yesterday and confirmed by the capture and interrogation of two commandos — directly contradicts Lebanese Armed Forces claims of control south of the river. If France and Lebanon want to talk about diplomatic frameworks, Israel will point to the Radwan commandos, the tunnel shafts, and the anti-tank caches as evidence that LAF enforcement was a fiction and UNIFIL's was a fabrication.

Inside Israel

Pardon Fight and Police Management Collide in Wartime

Heritage Minister Amichay Eliyahu — acting in place of Justice Minister Yariv Levin, who recused himself — submitted his position paper on Prime Minister Netanyahu's pardon request to President Herzog on Tuesday, reportedly concluding that Netanyahu should be pardoned to "enable the healing of the rifts" within the nation. Eliyahu submitted the paper alongside the Justice Ministry's pardons department assessment, which found that Netanyahu's request did not meet established criteria: no conviction, no admission of guilt, no expression of remorse — conditions set by the 1986 Barzilai ruling. Herzog's office responded that the president "will act solely in accordance with the law, his conscience, and the good of the country" and that no external

pressure “from any direction” — a pointed reference to Trump, who has publicly attacked Herzog for not granting the pardon immediately — would affect his judgment. The president’s legal adviser, Michal Tzuk, will now evaluate both position papers before issuing her own recommendation. In a parallel institutional fight, police detective Rinat Saban received her promotion to chief superintendent despite National Security Minister Ben Gvir’s yearlong refusal to sign off — a refusal the Jerusalem District Court ruled “unlawful” and likely driven by “extraneous considerations,” specifically Saban’s role investigating Netanyahu and testifying at his corruption trial. Ben Gvir filed a last-ditch Supreme Court appeal Tuesday morning, but Justice Alex Stein rejected the stay. Ben Gvir is separately blocking the promotion of another investigator, Ruti Hauslich, and Hebrew media reports rising tension between him and Deputy Commissioner Boaz Blatt, the only senior police officer who has not bent to the minister’s pressure. Separately, Attorney General Baharav-Miara ordered the immediate shutdown of a new Ben Gvir-created department that was probing terror-linked incitement. Speaking of terror-linked. In Judea and Samaria, Border Police seized 111 drones of various types from a store in Kafr Qallil near Nablus — prohibited under IDF military order — and arrested the Palestinian shop owner. The seizure follows a November 2025 exercise that found IDF forces in Judea and Samaria unprepared for UAV attack; troops failed to neutralize drones in 11 of 40 operational scenarios. Three Palestinians from Huwara — Moamen Odeh, Abdullah Odeh, and Mohammed Odeh — were indicted for the attempted lynching of a disabled ultra-Orthodox teenager who accidentally entered the village in January; residents circulated social media messages identifying him as Jewish and calling for an attack before the three suspects beat him unconscious.

ASSESSMENT

The legal guild is using wartime distractions to further entrench their own power—specifically, power not delegated to the judiciary by any Knesset law. The pardon-before-conviction gambit has no modern Israeli precedent, and the Barzilai ruling remains binding. Ben Gvir’s fight against Saban is simpler: a minister using his authority — previously treated as a formality — is still within his bailiwick. The court overrode him. The AG shut down his surveillance unit. His own appeal was rejected same-day. The institutional “guardrails” have morphed into executive authority. All this has done is served to almost force a “judicial reform” reckoning. The 111 drones in a Nablus store is operationally significant: a November drill proved the IDF cannot defend Judea and Samaria against small UAVs, and a single shop held enough airframes to equip a coordinated attack. The Huwara lynching — social media coordination, three suspects, a disabled teenager left for dead — is the textbook sequence that turns a village into an operational problem. Both items landed on the same day the IDF reassigned a battalion from Lebanon to Judea and Samaria. That’s the theater’s threat level rising while everyone watches Iran — all the while the courts increasingly involve themselves in security matters.

Knesset Sprints Through Wartime Legislation Before Recess

The Knesset passed the first reading of an unpaid leave law for employees during Operation Roaring Lion, shortening the minimum unpaid leave in

the private sector from 30 to 14 consecutive days, cutting the qualifying employment period from 12 to six months, eliminating waiting days, and capping compensation at 70% of salary through the end of April. Public sector employees will receive 100% coverage from day one — a gap that Israeli Presidency of Business Organizations Chairman Dubi Amitai called “substantial and absurd inequality.” The Ministry of Finance dismissed the criticism, saying the public-sector format was designed to maintain continuity in critical government services. An expedited second and third reading is scheduled in the Labor and Welfare Committee. The business compensation bill is not expected before May. Separately, the Knesset approved in first reading — 37 to 33 — a bill granting tax benefits to settlements in Judea and Samaria under security threat status, amending the Income Tax Ordinance to provide a 25% increase in the scoring system for tax benefits, comparable to what border communities already receive. The Yesha Council called it a correction of “long-standing discrimination.” The NIS 850 billion budget heads to a plenum vote on Thursday — the last major legislative act before the Knesset recesses until May. Meanwhile, the Iran war has stalled a cyber law the Israel National Cyber Directorate has been pushing for nearly a decade. INCD chief Yossi Karadi said he hopes for at least a first reading before elections in October, meaning the law will not be completed before 2027 at the earliest — this in a country ranked the third-most-cyber-targeted on the planet since October 7.

ASSESSMENT

The Knesset is legislating at wartime speed — and the gaps show. The unpaid leave law’s 70/100 split between private and public sectors is a political choice, not an operational necessity. The Ministry of Finance protected its own workforce while capping private-sector workers at less. The settlement tax benefits bill advances a structural priority.

Israel and the World

Gulf States Line Up Behind Continued War as Hormuz Crisis Deepens

Saudi Crown Prince Mohammed bin Salman urged President Trump in recent days to continue the war against Iran, calling it a “historic opportunity” to reshape the Middle East and arguing that only regime change eliminates the long-term threat to Gulf security. Riyadh allowed the U.S. to use one of its air bases. The UAE froze Iranian assets and warned it could freeze billions more. As we discussed yesterday, Bahrain, for its part, submitted a draft UN Security Council resolution authorizing the use of “all necessary means,” including force, to keep the Strait of Hormuz open. Saudi Arabia and the UAE are preparing for possible military entry if Tehran carries out threats against their energy and water infrastructure. An Iranian missile strike in Bahrain killed a Moroccan contractor working with UAE forces and an Emirati serviceman, with five additional UAE Defense Ministry personnel wounded. The Royal Navy is preparing to lead a coalition to reopen the Strait with mine-clearing support from the U.S. and France, after U.S. intelligence assessed that Iran has deployed naval mines in the waterway. Iran sent a message to

International Maritime Organization member states that “non-hostile ships” may pass through the strait — without defining what qualifies as non-hostile. The economic fallout is concentrated in Asia: Pakistan imposed a four-day workweek and remote schooling to conserve oil stockpiles. India faces a cooking gas shortage. Thailand’s fuel subsidy fund went into deficit. Airport delays across Asia stem from dwindling jet fuel. Taiwan’s chip industry — TSMC manufactures 90% of the world’s most advanced logic chips — depends on helium and sulfur sourced from the Middle East and electricity one-third powered by Gulf energy imports. The Philippines declared a state of energy emergency. European countries have responded by quietly lifting restrictions on Russian oil and gas purchases.

ASSESSMENT

The Gulf states are publicly aligning military infrastructure with an Israeli-American campaign against Iran — which they have never done at this scale. Saudi air bases. UAE asset freezes. Bahrain drafting a Security Council resolution that explicitly authorizes force. This is the Abraham Accords thesis — strategic alignment against Iran — tested under live fire, and so far it is holding. Don’t get too excited, the ideology vis-a-vis their view of Israel has not undergone a change. The Hormuz crisis is where the war goes global. Iran’s “non-hostile ships” formulation is an attempt to fracture the coalition — signal to Asian buyers that the strait is negotiable while keeping Western navies out — but it collapses under the first interdiction. Europe’s response — quietly buying Russian energy again — is a predictable capitulation.

Lebanon Expels Iranian Ambassador as Hezbollah Rejects the Break

Lebanon declared Iran’s ambassador-designate Mohammad Reza Sheibani persona non grata on Tuesday and ordered him to leave the country by Sunday. Foreign Minister Youssef Raggi also recalled Lebanon’s ambassador to Iran for consultations, citing Tehran’s “violation of diplomatic norms.” Sheibani — appointed in February, credentials not yet presented — had previously served in the role. During his previous tenure the Iranian embassy functioned as an IRGC branch office coordinating Hezbollah activation. Hezbollah rejected the decision publicly: “We reject the decision of the Lebanese Foreign Ministry, which is devoid of any legal justification.” Lebanese Parliament Speaker Nabih Berri and the Hezbollah leadership asked the ambassador to remain in Beirut despite the foreign ministry’s order — a direct challenge to state sovereignty by the organization that has operated as Iran’s franchise on Lebanese soil for four decades. Israeli Foreign Minister Gideon Sa’ar called the expulsion “justified and necessary” and called on Beirut to take “practical and meaningful measures against Hezbollah, whose representatives still serve as ministers within it.” French President Macron spoke with Herzog and said he was “convinced that the renewal of direct talks between Israel and Lebanon is an opportunity that must be seized.”

ASSESSMENT

Lebanon's government just expelled the operational liaison between Tehran and its most important proxy — and Hezbollah responded by publicly countermanding the state. That sequence tells you everything about who actually governed Lebanon for the last four decades and who is trying to now. The ambassador will likely stay in Beirut under Hezbollah's protection, which means Lebanon is a country where the foreign ministry issues an order and an armed faction simply vetoes the elected government. And people have been pressuring Jerusalem to enter talks with that government. Absurd. Any such talks must be predicated on the Lebanese government's ability to enforce its own decisions against Hezbollah's objections. It cannot, yet. The diplomatic opening may be genuine, but it sits on top of a military reality that Lebanon's government does not control.

Michigan Candidate Calls Condemning Synagogue Attack “a Risk” as European Attacks Continue

Michigan Senate candidate Abdul El-Sayed, running as a Democrat, described issuing a statement on the attempted terrorist attack on Temple Israel as “a risk.” El-Sayed had condemned the attack publicly — the alleged attacker, Ayman Ghazali, is the brother of a Hezbollah commander killed in an Israeli airstrike — but his statement also traced the attack back to Israel: “Imagine if there was no war in Iran. Imagine if there were no air strikes in Lebanon. Imagine if his family had never died. Imagine there was never an attack on Temple Israel.” During an internal campaign call, a participant identified as “Mauricio” justified the attack in a comment: “The synagogue raised funds for the IDF.” El-Sayed has declined to distance himself from the comment. Republican Senate candidate Mike Rogers responded: “If you’re having a moral crisis over whether to condemn terrorism, you’re unfit for office.” El-Sayed is also facing scrutiny over events with Jew-hating influencer Hasan Piker [who has repeatedly expressed support for terrorism]. In California, Governor Gavin Newsom backtracked on remarks characterizing Israel as an “apartheid state,” telling Politico he regretted the framing while maintaining his opposition to Netanyahu’s leadership. His partial retraction preserved the core formulation — that Israeli leadership is “walking us down” a path toward apartheid. In Belgium, police arrested two minors in connection with the torching of a car in Antwerp’s Jewish Quarter. The attack was claimed online by Harakat Ashab al-Yamin al-Islamiya (HAYI), the same group that claimed the Liege synagogue explosion on March 9 and four other suspected attacks across Europe targeting Jews — with a statement calling Antwerp a target because it “has a large Zionist community.”

ASSESSMENT

El-Sayed's internal call is worse than the public statement which was already bad — a five-paragraph "Imagine" exercise that converted a terrorist attack on a preschool into an indictment of Israeli military operations. To his voter base, speaking against a synagogue bombing costs you something. That is the state of the Michigan's Democratic primary — and it is the environment producing candidates for the United States Senate. Newsom's backtrack is structurally identical: withdraw the word, keep the frame. He is running for 2028, and "apartheid" polls badly for a general election, but the underlying critique — Netanyahu, settlements, far-right coalition — polls well in a Democratic primary. The HAYI campaign in Europe has now hit Belgium, the Netherlands, the UK, and claimed operations in at least five countries. Two minors torched the car in Antwerp. The operational profile is radicalizing younger, decentralizing faster, and operating with enough Telegram infrastructure to claim attacks across borders within hours. This is a terror campaign with a social media distribution network and it was enabled by political maneuvering much like we are now seeing in the United States.

Briefly Noted

Frontline & Security

- *Jerusalem Post*: The U.S. Treasury sanctioned Vancouver-based Seven Seas for International Trading and Logistics as part of a 16-entity, \$100 million network led by Hezbollah financier Alaa Hassan Hamieh — freezing its U.S. assets and barring American businesses from dealing with it. Canada has not sanctioned the company. BC's finance ministry said it learned of the designation from Washington, not Ottawa [which tells you almost everything you need to know about the Canadian government].

Diplomacy & Geopolitics

- *JNS*: Honduras's National Congress president José Tomás Zambrano called the U.S.-Israel war on Iran "a historic game changer" and relaunched the parliament's Israel Allies Caucus, citing Iranian terror ties to Central America through Hezbollah. The event followed Honduran President Nasry Asfura's Jerusalem visit in January — a reversal from his predecessor, who recalled her ambassador over the Gaza war.
- *Algemeiner*: PA media ran coordinated claims that Iranian missile strikes on Gulf states were "coordinated with the Israeli Mossad" to fracture Arab unity — with an official PA TV journalist presenting it as fact and a PA daily columnist arguing Iran and Israel share "overlapping goals" to weaken Arab states. The conspiracy framework serves a specific function: it preserves the PA's narrative that Israel is the region's sole aggressor even when Iranian missiles are landing on Arab capitals.
- *JNS*: Sen. Tom Cotton introduced the Educational Visa Transparency Act, requiring federally funded universities to report all non-citizen students, professors, and administrators to the SEVIS database, with DOJ and DHS granted access for enforcement. Cotton cited incidents of foreign nationals attempting to smuggle hazardous biological materials while posing as academic researchers.

Economy, Tech & Infrastructure

- *Times of Israel*: Eight new Polymarket accounts created around March 21 placed nearly \$70,000 in bets on a U.S.-Iran ceasefire before March 31 — and stand to collect \$820,000 — in what analysts described as a pattern consistent with insider knowledge, days before Trump’s public announcement of “productive talks.” One of the same wallets also placed winning bets on the February 28 strikes, was created just before the war, and has made no other bets — a profile that suggests access, not luck.

Culture, Religion & Society

- *JNS*: California Assemblywoman Rebecca Bauer-Kahan introduced a bill creating 100-foot protest-free buffer zones around house of worship entrances, with first-time violations carrying misdemeanor charges, fines up to \$10,000, and up to a year in jail. The bill responds to the sustained campaign of targeted harassment outside synagogues that has made attending shul in parts of California a security decision rather than a religious one.

Developments to Watch

Gaza & Southern Theater

- **Hamas consolidation unchecked** — Yesterday’s brief flagged Hamas taxing 4,200 weekly truck convoys, refurbishing tunnels, and recruiting in central Gaza. With the IDF’s operational focus locked on Iran and Lebanon, the window for contesting Hamas’s structural re-embedding continues to close. No new Israeli action reported in the past 24 hours. **LIKELY TO ESCALATE**

Northern Front (Lebanon / Syria)

- **Berri and Hezbollah defy ambassador expulsion** — Parliament Speaker Nabih Berri and the Hezbollah leadership asked the Iranian ambassador to remain in Beirut despite the foreign ministry’s Sunday deadline. If Sheibani is still in the country Monday, Lebanon’s government will have issued an order it cannot enforce — and every diplomatic framework built on Lebanese state capacity will have to answer for it.
- **France pushes direct Israel-Lebanon talks** — Macron told Herzog direct negotiations are “an opportunity that must be seized.” France is positioning itself as mediator, but the timeline collides with the IDF’s declared security zone and blown Litani bridges. Any framework requires Hezbollah disarmament south of the river — a condition both UNIFIL and Lebanon’s government has failed to deliver for two decades.
- **Iranian missile intercepted over Lebanon** — A ballistic missile was intercepted over Beirut-area airspace, with fragments striking Jounieh and Sahel Alma. Lebanese sources said a “foreign naval vessel” — likely U.S. —

conducted the interception. The IDF denied involvement. If Iranian missiles are now falling on or over Lebanese territory, Beirut's already fragile tolerance for Tehran's campaign acquires a new pressure point.

Regional Axis (Iran, Houthis, Militias)

- **Hormuz mine-clearing coalition forming** — The Royal Navy will lead an operation to reopen the Strait. Iran's naval mines are confirmed deployed. The timeline for a physical confrontation in the waterway is measured in days, not weeks. **LIKELY TO ESCALATE**
- **IRGC threatens Israeli shelter locations** — IRGC Intelligence Organization stated it has "detailed information on the structure and exact locations of Israeli shelters" and framed Israeli strikes on residential areas as justification for targeting them.
- **April 9 U.S. deadline and Vance back channel** — Reporting indicates Washington is targeting April 9 to conclude the conflict. Tehran refuses Witkoff and Kushner but will engage Vance, whom Iranian officials view as skeptical of the strikes. If a Vance-led channel opens this week, it could produce a framework that bypasses the maximalist 14-point outline and catches Jerusalem off guard.

Diplomatic & Legal

- **Gulf states preparing military entry** — Saudi Arabia and the UAE are positioning for possible direct military involvement if Iran strikes their energy and water infrastructure. The Bahrain casualties — one Moroccan contractor, one Emirati serviceman killed — crossed the threshold from proxy alignment to blood cost. A Saudi or Emirati combat operation would transform the war's architecture overnight.

Home Front & Politics

- **Budget vote Thursday, recess until May** — The NIS 850 billion budget goes to the plenum just before a month-long recess. Failure collapses the coalition and triggers elections during wartime.
- **Drone threat in Judea and Samaria unresolved** — The 111 drones seized in Kafr Qallil confirm what the November exercise already demonstrated: IDF forces in Judea and Samaria cannot defend against small UAVs. One shop, 111 airframes. The seizure raises the question of what has not been seized — and the battalion reassigned from Lebanon is not an air-defense unit.

Cluster munitions in Bnei Brak. A woman killed near Mahanayim. Interceptor fragments hitting a two-month-old in a Bedouin community with no shelter. That is the day's human cost — and it arrived on the same day Washington floated a ceasefire, the Pentagon deployed paratroopers, and the Knesset voted on tax benefits between shelter runs. The 82nd Airborne does not deploy for negotiations. Whether the ceasefire framework is a genuine off-ramp or the diplomatic cover for the next escalation depends on a single

variable: whether Iran's 440 kilograms of enriched uranium leaves the country before April 9. Everything else — the frameworks, the back channels, the Vance option — is furniture arrangement until that question is answered.

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

For the friend who heard “productive conversations with Iran” and assumed the war was ending — while cluster munitions were landing in Bnei Brak and the 82nd Airborne was boarding transport aircraft.

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