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March 31, 2026

ISRAEL BRIEF

Tuesday, March 31

Israel declares “completion phase” — but the Gulf states, the High Court, and Hezbollah’s anti-tank teams haven’t received the memo.

◇ URIEL ZEHAVI

THE BOTTOM LINE The procurement cut is the commercial instrument of a strategic divorce that France initiated. Paris supported a UN arms embargo on Israel — during a war against a state developing nuclear weapons and long-range missiles — then physically blocked Israeli companies from competing at a defense trade show. Baram’s “antisemitic” characterization is deliberate and considered: when a European government uses regulatory mechanisms to exclude a single country’s defense industry from competition, while that country fights a war the European country’s own citizens benefit from strategically, the word fits.

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Israel declares “completion phase” — but the Gulf states, the High Court, and Hezbollah’s anti-tank teams haven’t received the memo.

By Uriel Zehavi · מרתון מרתון Mar 31, 2026

Flash Brief

- **Completion phase declared:** Israel’s defense establishment says military objectives largely achieved; political leadership orders pivot to economic targeting — steel, gas, industrial infrastructure.
- **Chemical weapons center destroyed:** IDF strikes IRGC’s Imam Hossein University compound — wind tunnels, chemical weapons R&D, ballistic missile engineering center — all under civilian academic cover.
- **Gulf states warn Trump directly:** MBZ and MBS press Washington in private not to end the war without constraints on Iran’s nuclear, missile, drone, proxy, and Hormuz capabilities.
- **Hormuz bypass destroyed:** Iran strikes Habshan-Fujairah pipeline — the primary alternative to the strait; only Saudi Arabia’s East-West Pipeline remains functional.
- **Four Nahal soldiers fall in single engagement:** Capt. Madmoni, SSgt. Cohen, SSgt. Antis, SSgt. Harel killed in southern Lebanon; toll since renewed offensive reaches ten.
- **Death penalty for terrorists becomes law:** Knesset passes 62–48; bars exchange of death-sentenced prisoners — targeting the kidnapping incentive the Sinwar precedent illuminated all too well.
- **AG freezes Haredi budget maneuver:** Baharav-Miara blocks NIS 800 million overnight allocation; coalition queues draft exemption bill for post-war passage.
- **MSF staff knew Hamas was in the hospital:** JC investigation — internal messages, staff interviews, and a 2024 debrief confirm MSF personnel in Gaza were aware of Hamas presence and chose complicity.
- **Israel ends all defense deals with France:** Defense Ministry halts procurement over French support for UN arms embargo and defense exhibition restrictions.

The War Today

ISRAEL ENTERS “COMPLETION PHASE” — DESTROYS CHEMICAL WEAPONS CENTER, PIVOTS TO ECONOMIC TARGETING

Israel’s defense establishment declared on Monday that the air campaign has entered its “completion phase” — the stage at which initial military objectives are assessed as largely achieved and the political leadership has ordered a pivot to economic infrastructure. IDF Spokesman Brig. Gen. Effie Defrin said the military would finish striking all “critical” military production assets within days. The transition is already underway: strikes on two of Iran’s largest steel factories on Friday and major gas infrastructure in the south. Defense Minister Katz ordered additional economic strikes planned to compound the damage. The constraint is Trump’s April 6 deadline: Israel

agreed to suspend strikes on energy infrastructure while Washington holds that threat as its own lever, forcing the IDF to target steel, industrial, and dual-use sites instead.

The most significant disclosed operation is the destruction of the IRGC's Imam Hossein University compound in central Tehran — the regime's primary military academic institution, commanded by Brigadier General-equivalent Mohammad Reza Hassani Shahnegari. The IDF struck the site multiple times, destroying underground wind tunnels used for ballistic missile testing and development, a chemistry center used for chemical weapons R&D, and the technology and engineering center responsible for ballistic missile and weapons development. Multiple countries had sanctioned the university for advancing terror-linked weapons programs.

In the latest 24-hour cycle, the IDF struck approximately 170 targets with roughly 400 munitions — including weapons component production, UAV engine facilities, and R&D sites, plus the main Basij compound in Dehgholan and an Internal Security Forces police station in Sanandaj. A fire broke out at the Tabriz petrochemical complex, the largest in northwest Iran. Trump said that approximately 13,000 targets have been struck with roughly 3,000 remaining. The defense establishment assesses Iranian weapons production as “severely degraded, setting Iran back years” and says the conditions for regime change have been achieved “above and beyond” — while acknowledging it remains unclear whether the Iranian population will act. The nuclear dimension remains U.S.-led, including the disposition of Iran's 400+ kilograms of 60%-enriched uranium — enough, Israeli officials say, for 11 warheads.

ASSESSMENT

A chemical weapons research center hidden inside a university, under civilian cover, run by a sanctioned IRGC brigadier — that single target could justify the phrase “completion phase” more than any spreadsheet of strike counts. The wind tunnels for ballistic missile testing beneath a campus confirm what the campaign's architects planned for. The IRGC embedded its most sensitive military R&D inside institutions it assumed would be shielded by their academic designation. They were wrong. The pivot to economic targeting is the more consequential shift. It means the IDF has run through its pre-war military target set and is now generating new categories at political direction — steel plants, gas facilities, industrial zones. Whether this accelerates internal regime pressure or merely adds another line on the damage ledger depends on a timeline Israel doesn't control.

Yesterday's brief framed the targeting shift as regime change abandoned. Reader pushback sharpened the read, and the correction deserves the space. A more precise formulation: the operational theory shifted while the aspiration didn't. Nobody in Jerusalem has stopped wanting the regime to fall. The Soviet parallel is instructive — nobody bombed the USSR into collapse either. The regime fell because its economic model was unsustainable, its military overextension bled resources, and the security services' capacity to enforce compliance eventually couldn't keep pace. Iran's economy has the same structural flaw: military spending cannibalizing civilian infrastructure to sustain a proxy empire that is now in ruins. Pezeshkian just told the IRGC the wall hits in

three to four weeks. The trajectory points toward collapse. The question is timeline — and whether the IRGC's repressive apparatus has been degraded enough that the population has room to move when the moment comes. But the Iraq parallel is equally instructive and less comfortable. The U.S. destroyed the regime's military capacity in 2003, expected the population to build something better, and discovered that destruction and replacement are completely different operations requiring completely different capabilities. Israel and the U.S. are running the destruction half. Nobody has a credible plan for the replacement half — and the Kurdish invasion was supposed to be the bridge. So the completion phase tells you Israel has accepted a narrower but achievable outcome: a devastatingly degraded adversary whose reconstitution timeline is measured in years, not months — with the hope that Iranian civil society finishes the job on a schedule no one in Jerusalem or Washington can dictate.

There is a second reading of “completion phase” that deserves attention. Trump is expected in Israel for Independence Day to receive the Israel Prize — a visit that requires a narrative of success, not an ongoing campaign. A defense establishment that tells Washington “objectives largely achieved” is also giving a president who wants to announce a deal the framing to do it. The language may be operationally accurate and diplomatically strategic at the same time. Israel is racing to lock in irreversible damage before the political ceiling descends — and “completion phase” is the phrase that lets both Jerusalem and Washington claim the ceiling was the plan all along.

GULF STATES TELL TRUMP DIRECTLY THAT ENDING THE WAR SHORT MEANS ENDING THE GULF ECONOMY

UAE President Mohammed bin Zayed and Saudi Crown Prince Mohammed bin Salman warned Trump in recent days against ending the war without securing meaningful constraints on Iran's regional threat — the most direct pressure the Gulf states have applied to Washington since the campaign began. Both leaders framed the current conflict as a “historic opportunity” and told Trump the endgame must leave Iran unable to resume coercion. White House press secretary Leavitt, asked Monday whether restoring Strait of Hormuz navigation is a core war objective, stopped short — describing the administration as “working toward reopening” rather than defining it as a goal of the operation. Trump has apparently told aides he is willing to end the war even if the waterway remains largely closed. For Gulf capitals that have spent a month under missile and drone fire, that distinction is existential.

If that wasn't bad enough for them, Iran sharpened the stakes by striking the Habshan-Fujairah oil pipeline — the key bypass route allowing Gulf oil exports to circumvent Hormuz — leaving only Saudi Arabia's East-West Pipeline as the sole remaining alternative. On Saturday, Iran hit a UAE aluminum plant and caused heavy damage to two Kuwaiti ports. Monday brought a strike on a Kuwaiti desalination and power plant, which Tehran blamed on Israel. Aluminium Bahrain has shut down 19% of production capacity due to raw material shortages from the strait closure. Brent crude hit \$116.71/barrel. Oil

prices, now at nearly double pre-war levels, reflect a disruption entering its second month with no resolution mechanism in sight.

Saudi Arabia, Jordan, the UAE, and the U.S. all condemned Saturday's drone strike on Kurdistan Region President Nechirvan Barzani's home — one of more than 500 Iran-backed militia attacks on the autonomous region in the past month. Iraq's Defense Ministry found rockets ready to fire at Kurdistan, though it is unclear whether Iraq genuinely thwarted the launch or whether the militias told Baghdad where to look so it could perform cooperation for the cameras.

ASSESSMENT

The Leavitt distinction — “working toward” versus “core objective” — is a sentence the Gulf states are parsing most carefully right now. Should Trump declare victory without reopening Hormuz, the economic architecture underpinning Gulf governance breaks. Unfortunately, Iran's Fujairah strike was maybe the smartest single tactical move Tehran has made since the war started: it removed the Gulf's primary workaround and handed the continuation argument its strongest evidence. MBZ and MBS are no longer asking Trump to keep fighting — they're telling him what “ending” must include, and the list is maximalist: nuclear, missiles, drones, proxies, Hormuz, compensation. The Gulf states conditions now exceed Washington's own stated war aims. The question that hangs over every Gulf capital: does Trump's definition of “deal” include theirs? The early signals — Leavitt's careful language, the WSJ report — don't fuel much optimism in their halls.

FOUR NAHAL SOLDIERS FALL IN SINGLE ENGAGEMENT AS HEZBOLLAH ADAPTS UNDER PRESSURE

Four soldiers of the Nahal Reconnaissance Unit (934) fell in a single engagement in southern Lebanon: Capt. Noam Madmoni z”l, 22, from Sderot, team commander; Staff Sgt. Ben Cohen z”l, 21, from Lehavim; Staff Sgt. Maksim Antis z”l, 21, from Bat Yam; and Staff Sgt. Gilad Harel z”l, 21, from Modi'in-Maccabim-Re'ut. Another soldier was severely injured and two others moderately injured in the same incident. Their deaths follow yesterday's loss of Sgt. Liran Ben Zion z”l, bringing the toll since the renewed offensive to ten.

In separate incidents Monday, two soldiers were seriously wounded by an anti-tank guided missile, a Hezbollah drone strike seriously wounded one and moderately wounded two more, and an additional soldier was moderately injured in an operational accident. Multiple evacuation helicopters — more than eight by Israeli media count — deployed to southern Lebanon under covering at least two ongoing security incidents. The IDF struck Hamza Ibrahim Rakin, deputy commander of Hezbollah's Unit 1800 — the coordination network linking Hezbollah to Palestinian terror organizations across Lebanon, Gaza, Syria, and Judea and Samaria — along with the unit's operations officer in Beirut. Rakin oversaw the transfer of fighters to engage IDF troops in the south.

Troops of the 226th Brigade dismantled a command center, located missile launchers, and destroyed five advanced anti-tank missiles intended for launch against Israeli territory, clearing additional weapons caches from underground compounds. Evacuation orders were issued for towns in the eastern Beqaa

Valley. Netanyahu, in closed conversations with senior Trump administration officials, stated that a potential U.S.-Iran agreement would not affect the Lebanon campaign, rejected a French ceasefire initiative, and indicated Israel intends to push Hezbollah beyond the Litani. Defense Minister Katz spoke of applying the “Gaza doctrine” to southern Lebanon — systematic demolition and long-term IDF positioning.

ASSESSMENT

Four soldiers from the same reconnaissance unit in a single engagement — the heaviest single-unit toll since the renewed offensive began. Yesterday it was a 19-year-old tank commander. Today it's a team commander and three of his soldiers, all 21 or 22. I've sat with soldiers in rehab wards and on forward bases in the north, in Gaza, and in Judea and Samaria — carrying grief home for people who I never even got to meet. These paragraphs don't get easier to type. The cost is specific, cumulative, and borne by a force whose chief of staff has already warned cannot sustain the current pace.

Hezbollah's casualty-generation capacity has not broken. The elimination of Unit 1800's deputy commander matters operationally — 1800 is the coordination sinew connecting Hezbollah to Palestinian organizations across theaters, and cutting that link degrades the ability to synchronize cross-front operations. But the ambulance networks, the journalist cover, the anti-tank cells such as those we reported yesterday — these are adaptations under pressure, not indicators of collapse. Bibi's message to Washington — the Lebanon campaign continues regardless of any Iran deal — draws a line the White House hasn't publicly acknowledged. Katz's “Gaza doctrine” language confirms what the security zone expansion signaled last week: Israel is planning for years in southern Lebanon, not months.

Inside Israel

KNESSET PASSES DEATH PENALTY FOR TERRORISTS — AND THE LOGIC IS SOUND

The Knesset passed Ben Gvir's death penalty bill on Monday, 62–48 along coalition lines — after a nearly 10-hour debate held in a fortified auditorium — the plenum was unavailable due to the ongoing Iranian missile threat. The law applies in military courts to non-Israeli residents of Judea and Samaria convicted of murder, and in civilian courts to those who “intentionally cause the death of a person with the aim of denying the existence of the State of Israel.” Somewhat against expectations, Shas supported the bill per the directive of its Council of Torah Sages, citing the security establishment's position following October 7.

The legislation passed its first reading in November by 39–16 and was revised, under pressure, to give judges the option of life imprisonment rather than a mandatory death sentence. Execution is to be carried out within 90 days by hanging, though the prime minister may delay that up to 180 days. The critical provision: prisoners sentenced to death cannot be freed or exchanged. Israel released thousands of Palestinian security prisoners last fall in hostage negotiations, including roughly hundreds serving life sentences for murdering Israelis.

MK Zvika Fogel argued the bill represents “the state’s responsibility towards its citizens and its leadership towards human life.” Yisrael Beytenu MK Yulia Malinovsky, who cosponsors a separate Oct. 7 tribunal bill, said the coalition “understands that Otzma Yehudit’s bill cannot be implemented and will be struck down by the High Court” — but added, “I am in favor of the death penalty for terrorists.” Labor’s Gilad Kariv plans to petition the High Court. The foreign ministers of Germany, France, Italy, and the U.K. released a joint statement calling the bill discriminatory and urging Israel to abandon it. Hadash-Ta’al’s Aida Touma-Sliman compared it to apartheid South Africa and Jim Crow.

ASSESSMENT

The death penalty bill attacks the most perverse incentive structure in the conflict: convicted terrorists as currency. The Shalit deal released 1,027 Palestinians — including Yahya Sinwar, who went on to plan and execute October 7. Last fall’s exchanges freed another few hundred murderers. The pattern is lethal, terribly predictable, and self-reinforcing. Every release raises the value of the next kidnapping. The bill’s provision barring exchange of death-sentenced prisoners removes the incentive to take hostages for prisoner swaps by making the prisoners irrecoverable.

Ben Gvir has been making this argument for years, and the logic has only become more obvious since October 7. His closing response to the vote was four blue hearts. He’s happy, and he should be. It, like much, is a combination of politics and progress. Though as we have previously discussed, the bill has some mechanical problems. It excludes previously sentenced terrorists (like those it was marketed against), seems to provide no additional framework to secure convictions, and leaves the presidential pardon — the actual release mechanism in every past deal — untouched. The 90-day execution window may violate the Geneva Convention’s 180-day mandatory period (handing the ICC exposure the IDF explicitly warned against). The Rothman-Malinovsky bill moving through committee does some of the procedural work this one skips.

The logic of the incentive structure is right. That said, the High Court will almost certainly intervene — the judicial establishment has never encountered a security measure it couldn’t find constitutional grounds to block — and the European condemnation was delivered on schedule by four foreign ministers whose countries can’t enforce their own incitement laws. The rabbinical discomfort with capital punishment is real and deserves more than dismissal. Jewish legal tradition set the evidentiary bar for execution so high that the Talmud called a Sanhedrin that executed once in seven years “destructive.” That tension is more than worth exploring. Taking a life should never be an easy or readily accepted thing. But the Talmudic framework did not contemplate a world in which convicted murderers are released by the hundred to secure innocent hostages — and one of those released murderers then organizes the largest massacre of Jews since the Holocaust. The ethical question is not abstract: saving a life can sometimes require making another life unrecoverable. The alternative has been tried. The alternative produced Sinwar.

BUDGET AFTERMATH — AG FREEZES HAREDI FUNDS, COALITION QUEUES DRAFT EXEMPTION BILL

Attorney General Baharav-Miara froze the NIS 800 million in Haredi education funding within hours of the budget's passage — the overnight maneuver we covered yesterday now formally blocked. In a letter to government ministries, Baharav-Miara called the coalition's reservation "an unlawful attempt to circumvent Supreme Court rulings regarding military conscription" and instructed officials not to execute the transfers. Yesh Atid announced it would petition the High Court to permanently block the allocation — a motion that, given recent precedent, is likely to succeed.

MK Gafni called the AG's intervention "criminal by any standard" and accused her of hostility toward the Haredi public. The freeze sets up a judicial confrontation layered on top of the Hiddush petition from last week, which challenges a separate frozen NIS 98 million allocation and argues even the NIS 800 million already disbursed may exceed lawful entitlements — with a Finance Committee reporting deadline of April 15. The second shoe dropped Monday evening: Foreign Affairs and Defense Committee chairman Boaz Bismuth announced the coalition would resume advancing the Haredi draft exemption bill after the war's conclusion, as part of a legislative package including extended mandatory service and reserve duty regulation. Bismuth framed the move as fulfilling the chief of staff's request — but what Zamir actually told the cabinet was that the military would "collapse in on itself" without a conscription solution.

The bill on the table is the version drafted after the previous committee chairman was removed for attempting to penalize draft dodgers — critics, including the IDF brass, the AG, and coalition member Deputy Foreign Minister Sharren Haskel, have warned it enshrines exemptions rather than resolving the manpower shortage. Those critics are correct. Former Chief of Staff Eisenkot called it "an official draft-dodging law" and "a disgrace." "One hand exempts from service and rewards the draft dodgers, while the other hand extends the service for those who serve."

ASSESSMENT

The coalition's parliamentary craft lasted less than a day. The NIS 800 million passed at 3 AM; the AG blocked it by Monday evening. Haredi parties extract funding commitments, the AG or the High Court blocks implementation, both sides claim victory, and the underlying issue — who serves and who doesn't — remains unresolved while soldiers die in Lebanon. At this point... what else is new? The disfunction is galling.

Bismuth's framing is an inversion of what Zamir actually said. The chief of staff asked for a conscription law that solves the manpower crisis. What the coalition is drafting is an exemption law in conscription packaging — and the IDF itself has warned it will make the problem worse. Eisenkot's characterization is properly blunt. Extend service for those already serving. Exempt those who refuse. And call it a solution. Haskel's dissent from within the coalition — rare and pointed — signals that the political cost of the bill may be higher than the Haredi parties' leverage warrants.

The fiscal picture underneath all of this: NIS 850 billion in spending, a 5.3% deficit, a war costing \$1.6 billion per week, and a Bank of Israel forecast that assumes the fighting stops next month. If it doesn't, the growth assumptions dissolve — and the NIS 5+ billion in coalition payoffs become a line item in a budget that can't cover the war it's financing.

Israel and the World

MSF STAFF KNEW HAMAS WAS IN THE HOSPITAL — AND CHOSE SILENCE

A Jewish Chronicle investigation based on internal messages, staff interviews, and leaked forum posts revealed that Doctors Without Borders employees used terms including “genocide,” “ethnic cleansing,” “fascism,” and “white supremacist logic” in internal discussions about Israel — and that staff in Gaza were aware Hamas militants operated inside hospitals where MSF provided care. A source described a 2024 debrief in which a colleague returning from Gaza stated: “We know there are doors we can't go through in the hospital, and we know that Hamas is in the hospital.” The colleague said revealing Hamas's presence might result in being forced to leave Gaza.

At Nasser Hospital in Khan Younis, staff described restricted areas and floors where they were “not welcome.” Michael Goldfarb, a 15-year MSF US veteran, described “selective outrage” and a “permissive environment” for Jew-hate. European colleagues told him Israel doesn't have a right to exist. A suggestion to send solidarity messages to Jewish staff during a 2021 spike in violence was rejected because “it's complicated.” Dr. Estrella Lasry, a 14-year staffer and former board member, described “appalling lack of empathy” toward October 7 victims and received an “explicit request” from the MSF not to speak on behalf of Israeli victims “as it would victimise the perpetrators.” She was told she was part of the “Israeli propaganda machine” in a meeting — “and nobody flinched.”

Javid Abdelmoneim, who became MSF's international president in early 2025, had endorsed a full boycott of Israel and reposted messages calling it “a colony of settlers” committing “ethnic cleansing” and “the greatest threat to Judaism.” MSF's post blaming Israel for the al-Ahli Hospital explosion — later attributed to a misfired Palestinian rocket — remains online. Israel banned MSF from Gaza last month after it refused to hand over a staff list; the High Court temporarily halted the ban.

ASSESSMENT

The investigation answers the question Israel has been asking — and been called a liar for asking — since October 7: did MSF know Hamas operated in hospitals where it worked? The answer, from MSF's own staff, is yes. The operational logic is straightforward and damning. MSF's access to Gaza depends on not reporting what it sees. It chose access over disclosure, then used that access to generate a “genocide” determination based on observations made under conditions it knows are controlled by Hamas. If it were just interested in serving civilians in Gaza, fine. But they weren't. Which is clear from the billboards in the UK and the blood libels they chose to spread.

The internal forum language — “76-year-old crime scene,” “absolute evil of Zionism,” “decolonise our minds” — is the culture that produced and sustains that choice. An organization whose international president called Israel “the greatest threat to Judaism,” whose UK branch ran billboard campaigns declaring genocide, and whose al-Ahli Hospital accusation remains posted despite being factually wrong is not a humanitarian organization. Propagandists and terror sympathizers hiding behind a white coat. Disgusting.

Every MSF report from Gaza. Every casualty figure cited. Every claim of Israeli targeting of medical infrastructure — all of it now carries a disclosed institutional bias and a confirmed willingness to conceal the presence of combatants in facilities MSF claims are being attacked without justification. And yet some supposedly logical Jewish friends still send donations to this organization.

TORONTO MARCHES PAST SYNAGOGUES; AUSTRALIA ARRESTS SEVEN FOR TARGETING JEWISH FEMINIST

Toronto police escorted a pro-Palestinian protest down Sheppard Avenue past Darchei Noam Synagogue, the Toronto Heschel School, and the L’Chaim Seniors Residence on Saturday — one week after Deputy Chief Frank Barredo announced restrictions on such demonstrations in Jewish residential areas. Protesters chanted “all Zionists are terrorists” through megaphones. Israel’s consul in Toronto, Idit Shamir, confirmed groups broke off onto residential side streets. There were no arrests.

Police later said the restriction applied only to residential side streets, not the main intersection — a distinction not apparent in Barredo’s original announcement. City Councillor James Pasternak confirmed protesters were “looking for an entry point into the neighborhood to harass the local residents.” The Canadian Antisemitism Education Foundation called the march a “hate parade” and asked: “Toronto Police would not tolerate a white supremacist parade up and down Jane St. — so why are Toronto’s Jews required to tolerate it?” In a separate Land Day demonstration, a protester identified as an Iranian regime supporter held up a Netanyahu effigy with a noose, spat on it, and stomped on it. Chants included “the only solution is intifada” and “we will sacrifice our souls and our blood for Al-Aqsa.”

In Melbourne, Victoria Police arrested and charged seven women — aged 34 to 71 — for defacing the statue of Jewish feminist Zelda D’Aprano with red spray paint on March 6, using umbrellas to block cameras. Six were bailed; an eighth suspect remains at large. Separately, police are searching for a driver who swerved a stolen vehicle at a group of Jews in Melbourne on March 25.

ASSESSMENT

Toronto police defined their restriction so narrowly that the mob marched past a synagogue, a Jewish school, and a seniors' residence — with a police escort — and no one violated anything. The technique is familiar from London: announce enforcement, define the violation down to nothing, then cite lawful demonstration protections when constituents complain. Chanting "all Zionists are terrorists" outside a Jewish school is targeted intimidation of a minority population in the spaces where they live, learn, and pray — and Canadian law enforcement has decided it doesn't qualify as a problem. Apparently they've never cracked open a history text. We know where this leads.

The Melbourne arrests are a rare exception: seven women charged for a targeted act of vandalism against a specifically Jewish target, with the camera-blocking suggesting premeditation and awareness that the act was criminal. The pattern across both cities though is consistent. Jewish communities are absorbing escalating physical and symbolic attacks while law enforcement calibrates its response to avoid confrontation with the attackers.

ISRAEL ENDS ALL DEFENSE DEALS WITH FRANCE

Israel's Defense Ministry halted all defense procurement from France, with Director-General Amir Baram deciding to replace French-sourced equipment with Israeli-made alternatives and purchases from friendly countries. The move follows a sequence of French actions since October 7. Such as restrictions on Israeli participation in defense exhibitions, support for a UN General Assembly resolution calling for an arms embargo on Israel, and the blocking of parts of the Israeli pavilion at the Paris Air Show during the June 2025 war — an act Baram called "absolutely, bluntly antisemitic" and accused Paris of using to suppress Israeli industrial competition. The Defense Ministry said France's actions came "at a time when Israel is fighting a necessary and just war to eliminate the nuclear and ballistic threat facing the Middle East, Europe and the entire world."

ASSESSMENT

The procurement cut is the commercial instrument of a strategic divorce that France initiated. Paris supported a UN arms embargo on Israel — during a war against a state developing nuclear weapons and long-range missiles — then physically blocked Israeli companies from competing at a defense trade show. Baram's "antisemitic" characterization is deliberate and considered: when a European government uses regulatory mechanisms to exclude a single country's defense industry from competition, while that country fights a war the European country's own citizens benefit from strategically, the word fits.

The practical impact is limited — Israel's defense industrial base produces most of what it needs domestically, and the remaining gaps can be filled by the U.S., Germany, Italy, and a growing roster of Indo-Pacific partners. The strategic message is the point: France chose a posture, and Israel is treating it as binding. Macron's government joined the pressure campaign against Israel and is now learning that pressure works in both directions. To our MK and ministry friends: a closer look at France's facilities in Jerusalem could be warranted.

Briefly Noted

FRONTLINE & SECURITY

- **[JNS]:** The Shin Bet dismantled a Hamas cell in Judea and Samaria directed by Mahmoud Radwan — a convicted terrorist released in the 2025 prisoner exchange and deported to Turkey after serving time for the 2001 murder of Yossi Alfasi. Radwan recruited two Azzun residents during a December meeting in Istanbul; indictments have been filed. Another released prisoner, another terror network — the Shalit-Sinwar pipeline keeps producing.
- **[Jerusalem Post]:** Syria's army said drone attacks from Iraq targeted several of its military bases near the eastern border — a rare direct strike on Syrian positions since the February campaign began. Damascus deployed thousands of troops to both its Lebanese and Iraqi borders this month but has so far avoided entering the conflict, which might be the smartest decision Assad's successor has made.

DIPLOMACY & GEOPOLITICS

- **[Jerusalem Post]:** Saudi Arabia, Jordan, the UAE, and the U.S. all condemned Saturday's drone strike on Kurdistan Region President Barzani's home — one of more than 500 Iran-backed militia attacks on the autonomous region in the past month. Iraq's Defense Ministry displayed rockets it claimed to have found near Kirkuk; whether Baghdad intercepted them or was told where to look so it could perform cooperation is anyone's guess.
- **[Ynet]:** Senators Markey and Merkley reintroduced the No Nuclear Weapons for Saudi Arabia Act, seeking congressional approval before any U.S.-Saudi 123 Agreement — a deal reportedly permitting Saudi uranium enrichment on its own soil. Riyadh leveraged the Iran war to extract precisely the dual-use nuclear technology the international community denied Tehran for two decades. The non-proliferation regime has a consistency problem, and MBS knows it.
- **[Algemeiner]:** A nonbinding DNC resolution calls on Democrats to reject or distance themselves from AIPAC funding — designed less to change policy than to force candidates into a public position on pro-Israel money during primary season. Three new pro-Palestinian PACs entered the 2026 midterms with at least \$10 million pledged, backing candidates who support conditioning military aid; the infrastructure for an intra-Democratic war over Israel is now funded and operational.
- **[The JC]:** Acumen Risk's Doron Goldberg argues that Israel's destruction of Iran's proxy network won't extinguish radical Islamist ambition — it will redirect it toward Europe, where 32% of EU citizens would fight for their country, army recruitment hits 64% of target, and the radicalization pipeline documented by Europol is already running at record volume. The thesis tracks our Controlled Surrender analysis. The threat migrates toward societies that won't fight, militaries that can't, and populations among which radicalization proceeds largely unchecked.

- **[Jerusalem Post]:** Trump revealed a “massive” fortified military complex under construction beneath the new White House ballroom — a \$400 million project replacing the demolished East Wing and its Presidential Emergency Operations Center, with bulletproof glass and a drone-proof roof. The National Capital Planning Commission votes Thursday. To my father’s chagrin, critics, historians, and a pending lawsuit have not slowed it.

DOMESTIC & LAW

- **[Jerusalem Post]:** Complaints against judges rose from 770 in 2024 to 1,100 in 2025, but 92% were rejected on review — and 79% of the 24 justified complaints concerned delays and case management, not misconduct or ideology.
- **[Jerusalem Post]:** The High Court heard journalist Omri Assenheim’s appeal against orders to release raw footage from his Eli Feldstein interview — a case testing whether journalistic privilege covers unpublished material or only source identity. Justice Amit suggested the police request for everything on the cutting-room floor resembled a “fishing expedition.” No ruling was issued, but the court appeared open to a middle path that neither grants absolute privilege nor permits blanket seizure.

ECONOMY, TECH & INFRASTRUCTURE

- **[Globes]:** The Bank of Israel held rates at 4% and cut its 2026 GDP growth forecast to 3.8% — down from a January projection of 5.2% — citing the war and a marked increase in global energy prices. The forecast assumes the war ends in April; the 2027 projection of 5.5% growth is the bounce-back scenario, and every week the fighting continues erodes the assumptions underneath it.

CULTURE, RELIGION & SOCIETY

- **[The JC]:** London’s Metropolitan Police will deploy surveillance drones as “first responders” over Pesach, with 260+ additional officers, armed response units, and plainclothes operatives — resources nearly tripled in high-risk areas like Barnet after the Hatzola attack. Commander Conway cited “a confluence of state-backed threats, terrorism, and the destabilizing impact on community cohesion” — police language for what the rest of us recognize as a war on Jews conducted on British streets.
- **[The JC]:** An essayist makes the case for refusing to surrender the art of antizionist artists — Waters, Eno, Rooney, Bardem, Kneecap — arguing their work belongs to the audience regardless of the creator’s politics. The cultural landscape is dominated by antizionist groupthink, and to that author, declining to relinquish the pleasure is its own quiet act of defiance.

Developments to Watch

REGIONAL AXIS (IRAN, HOUTHIS, MILITIAS)

- **Trump’s April 6 deadline — deal window or escalation trigger** — Pakistan-mediated talks reportedly advancing; Trump says a deal could come “very quickly.” Iran publicly denies direct negotiations. Leavitt warned that private commitments will be tested and failure to deliver triggers military

consequences — specifically energy infrastructure, oil wells, and Kharg Island. Israel suspended energy strikes as part of the arrangement. The next six days determine whether the campaign escalates to Iran's economic lifeline or transitions to a ceasefire framework nobody in the region trusts.

LIKELY TO ESCALATE

- **Kharg Island ground option live** — Two Marine expeditionary units are deploying. Trump said the seizure would be “very easy” and that Iran “has no defense.” Iran's First VP Aref responded that forces sent to Kharg “would not return from hell.” Oil at \$116/barrel. The ground option remains the single biggest escalation card Washington hasn't played — and the one Tehran appears most afraid of.
- **Hormuz bypass destroyed — one pipeline left** — Iran's strike on the Habshan-Fujairah pipeline eliminated the primary alternative export route bypassing the strait. Only Saudi Arabia's East-West Pipeline remains functional. A strike on that pipeline would shut down Gulf oil exports entirely — no workaround, no redundancy. Iran has demonstrated both the capability and the willingness to target energy infrastructure in every Gulf state. The question is whether Tehran calculates that destroying the last bypass strengthens its negotiating hand or triggers the Kharg operation it's trying to prevent.
- **Iran's economic collapse clock — late April fiscal wall** — Pezeshkian warned the IRGC that without a ceasefire the economy collapses in three to four weeks. The steel factory and gas infrastructure strikes compound the pressure. If the timeline holds, the regime faces a fiscal crisis around late April — but the IRGC rejected Pezeshkian's demand for returned executive powers. The people with the guns have little interest in the spreadsheets.
- **Iran cyber and HUMINT campaign intensifying into Pesach** — The National Cyber Directorate reported 50 Israeli security cameras breached and data destroyed across 60 companies since the war began — assessed as supporting damage assessment and operational surveillance. There are parallel cyber escalations targeting U.S. and Gulf entities. Espionage cases in Eilat (air base employee) and Tel Aviv (14-year-old recruited to scout both the Kirya and Sa'ar's home) confirm an active IRGC HUMINT operation running alongside the kinetic campaign. Low-cost, high-yield, and likely to intensify over the holiday.

NORTHERN FRONT (LEBANON / SYRIA)

- **Netanyahu decouples Lebanon from any Iran deal** — Told senior Trump administration officials in closed conversations that a U.S.-Iran agreement would not stop the Lebanon campaign. Rejected French ceasefire. Katz invoked “Gaza doctrine” — systematic demolition and sustained IDF presence. If a ceasefire materializes on the Iran front, Lebanon becomes the sole active theater with no international framework, no enforcement mechanism, and an Israeli military presence the PM has described in terms of years, not months. The cost is five soldiers killed in 48 hours and a chief of staff who says the force cannot sustain the pace.

JUDEA & SAMARIA

- **Turkey-based Hamas recruitment after prisoner releases** — Mahmoud Radwan, released in the 2025 prisoner exchange and deported to Turkey after serving time for the 2001 murder of Yossi Alfasi, recruited a cell in Judea and Samaria within months of his release. The Shin Bet indicted the recruits. The pattern confirms the structural incentive the death penalty bill targets: released prisoners do not retire. They reconstitute — and Turkey is becoming the operational base from which they do it.

DIPLOMATIC & LEGAL

- **Passover global threat window — active through end of holiday** — NSC assessment of Iranian-directed targeting of Israeli and Jewish sites worldwide at unprecedented levels. Pesach begins tomorrow night. Specific guidance issued for UAE, Armenia, Azerbaijan, Georgia, India, and Thailand. Ben Gurion Airport remains closed; land crossings through Sinai and Jordan at Level 4. London deployed drones and tripled police presence in Jewish neighborhoods after the Hatzola attack. The FBI linked the Michigan synagogue attack to Hezbollah and Iranian fatwas. Bahrain dismantled a Hezbollah-linked cell trained in Lebanon and planning domestic attacks. The operational window runs through at least the eighth day of the holiday.

LIKELY TO ESCALATE

- **Death penalty — High Court collision imminent** — Labor's Kariv plans to petition the High Court, joined by Israeli human rights organizations. The EU threatened sanctions. The law's provision barring exchange of death-sentenced prisoners is the operative mechanism — and the one most likely to draw judicial scrutiny, since it constrains future government action on hostage negotiations. The question isn't whether the court hears the case — it's whether it issues an interim injunction before the law is ever applied.

HOME FRONT & POLITICS

- **Hiddush petition — April 15 court deadline** — The Finance Committee must report to the High Court on the frozen NIS 98 million Haredi education allocation. Hiddush's letter argues even the NIS 800 million passed in the budget maneuver may exceed lawful entitlements and could require partial clawback. If the court orders a broader review, the coalition faces a judicial confrontation over wartime budget allocations — layered on top of the AG's freeze and the draft exemption bill Bismuth just put back on the legislative calendar.

This is the last edition before Pesach. We return Sunday, April 12. The seder begins Wednesday night with a question the Haggadah asks every year and the war answers every day: Mah nishtanah — what has changed? The military campaign has degraded Iran beyond what most analysts predicted a month ago. The political campaign to translate that into a durable outcome has not kept pace. Five soldiers fell in Lebanon in 48 hours. A law designed to prevent the next Sinwar passed the Knesset and will now face the High Court. The Gulf states are placing bets Washington may not honor. And the only Hormuz

bypass pipeline is on fire. Somewhere between the completion phase and the seder plate, the country is doing what it always does — absorbing the unbearable and setting the table anyway.

Chag Pesach sameach. Make it count.

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Mitzpe Institute is an intelligence and strategy organization focused on Israeli security, diaspora threat assessment, and the strategic challenges confronting the Jewish people and the West. We produce daily intelligence, forensic analyses, strategic assessments, and tactical briefings read by policymakers, military leaders, and institutional decision-makers across more than 90 countries and all 50 US states — from the Knesset and the US Congress to allied governments, major policy institutions, and Jewish organizational leadership worldwide.

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