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READER EDITION

April 20, 2026

ISRAEL BRIEF

Monday, April 20

Tehran walks out of Islamabad as the Yellow Line collects its first body — thirty hours to the Tuesday night Iran cliff.

◇ URIEL ZEHAVER

THE BOTTOM LINE Barcelona and Michigan are facets of the same project. Barcelona produces the communique. Michigan produces the replacement of a Jewish incumbent who defended Israel with a lawyer who praised Hezbollah on X. Both are recruitment and credentialing operations — Barcelona for heads of state and senior legislators, Michigan for the next generation of state-level Democratic officeholders — and both run on the proposition that opposition to Israel is no longer a niche progressive preference but the organizing principle of a serious international political coalition. [The guest list Soros assembled — a sitting South African president whose government is prosecuting Israeli leaders at the ICC, a Spanish prime minister calling for trade-boycotting Israel, a Brazilian president who has compared the Gaza war to the Holocaust, a UK justice secretary whose government has throttled Israeli arms exports — forms a cabinet of Jew-haters.] Murphy’s “totalitarian takeover” framing of Trump is the American domestic rhetoric that lets the international cohort position anti-Israel policy as democratic self-defense rather than foreign-policy preference — the same rhetorical move Bernie Sanders executed on the Senate floor to try to block Israeli arms sales. Michigan’s Democratic electorate voted to elevate a lawyer who praised Hezbollah over a Jewish incumbent who defended Jewish students during the 2024 encampments. That is the sub-national version of what Barcelona produced in ministerial form. The J Street line — that Israeli missile defense should not be of concern to anyone outside of Israel — has moved from an edge position into one of the two main Democratic primary lanes, and the 2028 presidential field is sorting itself against it. The lesson Luxembourg will extract from Barcelona on Tuesday is that European popular-vote politics now ratify the pro-suspension position. The lesson Washington should extract from Michigan is that Democratic primary politics now ratify the anti-Zionist one. Both lessons are visible. Both are being acted upon. What remains is whether any functioning coalition on either side of the aisle is willing to say so out loud while the election cycles still allow it.

CLASSIFICATION

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THE Iran truce Trump brokered runs out Tuesday night. And Tehran spent the weekend telling Washington it will not show up for the round of talks that is supposed to prevent the expiry. The 162nd Division spent Sunday demonstrating that the ten-day Lebanon truce will be enforced on Israeli terms — published map, depopulated villages, first Yellow Line kill. The Luxembourg foreign ministers open tomorrow on the first post-Orban meeting agenda the EU has run in four years. Everything today sits between the arrangements signed and those that will actually have to be made when they expire.

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Flash Brief

- **Lebanon Yellow Line:** IDF kills first truce-line crosser as the 162nd unveils its depopulated buffer strategy. *See The War Today.*
- **Hormuz:** Marines board sanctioned Iranian vessel Touska; Iran refuses the scheduled Pakistan second round Monday. *See The War Today.*
- **Gaza:** Hamas offers police rifles, keeps the Qassam arsenal; Smotrich calls for full IDF conquest. *See The War Today.*
- **Supreme Court:** Amit, Sohlberg, and Barak-Erez try to bypass Levin by sending their own candidate list to the gazette. *See Inside Israel.*
- **Iran shadow war:** Mossad exposes IRGC Unit 4000; two more Israelis indicted for Iranian handling via Telegram. *See Inside Israel.*
- **Kiryat Shmona:** Likud mayor brings strike to US Embassy; Likud city rejects Likud PM's Lebanon truce. *See Inside Israel.*
- **Luxembourg Tuesday:** First post-Orban EU foreign ministers' meeting convenes as suspension petition crosses 1.1 million. *See Israel and the World.*
- **Milei:** Isaac Accords signed; Argentina opens Jerusalem embassy and announces direct Ben Gurion–Buenos Aires flights. *See Israel and the World.*
- **Soros summit:** Barcelona assembles a progressive cabinet; Michigan Democrats replace Jewish incumbent with a Hezbollah-praising attorney. *See Israel and the World.*

BELOW: the depopulation logic that makes this buffer zone a different proposition than the 1985 one, the Unit 4000 exposure Iran needed suppressed, the Sohlberg signature Levin's coalition will answer with legislation, and why the mayor of Kiryat Shmona is reading the truce correctly.

Underneath this all is a single shape. Israel is operating at a level of tactical dominance the country has never held before. What Israel does not have is the strategic architecture to convert much of it into arrangements that outlast the current administration in Washington. The Lebanon truce holds only so long as the IDF stays south of the Litani. The Board of Peace holds only so long as everyone pretends the Qassam arsenal is negotiable. Tuesday night in Islamabad is the first place that gap will start to unravel. The Lebanon line is where the gap looks most like a war that has not actually ended.

The War Today

Forward Defense Line Holds as the 162nd Unveils a Depopulated Buffer

The IDF killed an armed terrorist Sunday who crossed the Forward Defense Line in the 162nd Division's sector and approached Israeli soldiers — the first enforcement kill since Trump's ten-day truce activated. The military published the line: it runs roughly 15 kilometers north of the international border, crosses the Litani, and includes the strategic Beaufort Ridge. Five divisions now operate south of the line. The 162nd alone reports 251 identified

Hezbollah fighters killed, over 405 terror infrastructure sites dismantled, and more than 1,000 weapons and munitions recovered — figures unfortunately paid for with the lives of three Nahal Reconnaissance operators and one soldier of the armored 401st Brigade. The 162nd's first journalist tour this week revealed the strategic innovation underneath the operational numbers: pro-Hezbollah villages that anchored the old 1985–2000 security zone have been depopulated and reduced to rubble. Aita al-Shaab, once Nasrallah's insurgent base during the first zone, is gone. Beit Lif is gone. The Christian village of Debel, by contrast, remains intact and unharmed. The second differentiator is a lighter footprint. No large outposts. Reliance on technical means to intercept Hezbollah fighters moving south from the north. Chief of Staff Eyal Zamir designated the area up to the Litani a “killing zone for Hezbollah terrorists” during a Wednesday visit to the 162nd in Beit Lif. Hezbollah deputy political council chief Mahmoud Qamati from the podium this week: “The finger of resistance will remain on the trigger.” Lebanese authorities have partially reopened the Burj Rahal-Tyre bridge and begun repair work on other infrastructure struck during the war. Fifteen IDF troops have been killed in the current Lebanon round.

ASSESSMENT

What Israel has built south of the Yellow Line is the 1985 security zone with the civilian population removed — which is what the first security zone needed to survive and did not have. The 2000 withdrawal happened because Hezbollah could operate among a Shia civilian population that gave it cover, food, intelligence, and recruitment. The IDF could not overcome that without either depopulating the villages or abandoning the zone. The first decision was abandonment. This decision is depopulation [and then pretending the question of what the displaced villages' former residents will do next is Lebanon's problem to solve]. It's messy, but the operational logic holds. A guerrilla force that cannot embed in civilian mass cannot run the attritional campaign that collapsed Israeli political tolerance the last time. The Christian village left intact, the Shia villages erased — that is the strategic map Naim Qassem, Hezbollah's Nasrallah successor, rejected from the podium this week, and the reason this truce will not get Hezbollah what it is begging Tehran to get for it. The forward-deployed five divisions are the General Staff telling anyone still reading Truth Social that whatever Trump prohibited from the air, the army will execute on the ground. The war in Lebanon has not ended. It has been re-specified.

Marines Seize the Touska as Iran Refuses the Pakistan Track

US Marines rappelled from helicopters launched off the amphibious assault ship USS Tripoli onto the Iranian-flagged cargo ship Touska in the north Arabian Sea on Sunday morning, after the guided-missile destroyer USS Spruance disabled the vessel's propulsion by firing into its engine room when Touska refused to comply with repeated warnings across a six-hour window. Iran's Khatam al-Anbiya joint military command — the apparatus now de facto controlled by IRGC commander Ahmad Vahidi (who theoretically is the only one allowed to talk to Khomeini Jr.) — accused Washington of violating the truce and vowed retaliation through IRGC-affiliated Tasnim. Foreign Minister Abbas Araghchi, the civilian face of a negotiating track the IRGC does

not permit to conclude anything, called American conduct “proof of America’s lack of seriousness in diplomacy” in a phone call with Pakistani counterpart Ishaq Dar. Iran formally rejected participation in the scheduled Monday second round of Islamabad talks, citing “Washington’s excessive demands, unrealistic expectations, constant shifts in stance, repeated contradictions, and the ongoing naval blockade, which [it considers] a breach of the cease-fire.” A US delegation (Vice President JD Vance, Special Envoy Steve Witkoff, and Jared Kushner) officially remains scheduled to travel. Netanyahu convenes the security cabinet today ahead of Tuesday night’s truce expiry. 20+ vessels transited Hormuz Saturday, the highest traffic since March 1 — carrying Iranian and Gulf cargo to China, India, Indonesia, South Korea, Italy, and Thailand. IRGC gunboats also fired warning shots at a French vessel Saturday. The ship was hit but the crew is safe. Two additional Indian-flagged tankers were allowed to begin transit before coming under fire mid-strait. Aman’s Military Intelligence Directorate presented a projection of Iran’s missile restoration trajectory covered in a Galei Tzahal report: without Operation Roaring Lion, Iran would have accumulated approximately 8,000 ballistic missiles within 18 months and up to 11,000 within 2.5 years. Under current post-strike conditions, Aman assesses that in both “severe” and “reasonable” scenarios Iran can accumulate thousands within a few years — contingent on Chinese supply of raw materials and mixers and on whether the regime prioritizes missile production over domestic recovery. Israel has drawn a red line at the threshold where Iranian missile volume would overwhelm existing air defense, and Jerusalem has made clear that reaching that threshold will require a preemptive strike. IRGC Aerospace Force commander Majid Mousavi released a Sunday video claiming Iran is replenishing faster than before the war — the Aman analysis a sober version of the same underlying fact. The aircraft carrier USS George H.W. Bush is transiting toward the region. The USS Gerald R. Ford is already in the Red Sea.

ASSESSMENT

The Tуска boarding is the first US direct-action seizure since the blockade began. A sanctioned Iranian-flagged ship had its engines disabled by naval gunfire, was boarded by Marines who rappelled from helicopters off an amphibious assault ship, and was taken into custody — all while Khatam al-Anbiya issued a retaliation promise from the same apparatus Vahidi consolidated after personally blocking the Islamabad delegation from compromising on enrichment in the first round. [This is what the Iranian civilian diplomatic track looks like when the IRGC has already decided the civilian delegation will not be permitted to do anything.] Iran's formal rejection of the second round does not break the track but it tells the White House in advance that whatever emerges from Islamabad will not include the enrichment concession Vahidi has already vetoed. Trump's choice Tuesday night is binary. He must either accept the framework the IRGC is willing to deliver and declare victory, or revive kinetic pressure and execute the Kharg option Aref called a "one-way trip to hell." Mousavi's missile-replenishment video is the IRGC speaking to its own constituency. Every senior commander still in hiding needs evidence the regime survived something, and "we replenish faster than before the war" is the face-saving line the operational situation does not actually support. A senior official reveals a six-point framework is under active US-Iran discussion. Namely, a 15-year enrichment suspension (settled between the US's opening 20-year demand and Tehran's shorter ask). The existing HEU stockpile down-blended into uranium gas but left on Iranian soil. Inspections conducted by US representatives rather than the IAEA. Hormuz reopened without Iranian toll. A formal war-end with US withdrawal from the Gulf. And phased sanctions relief. The sanctions-relief item is the one Jerusalem should be watching most carefully. Regime change was never the explicit US strategic goal. The goal was structural collapse through sanctions pressure, and that collapse is actively underway. Lifting the sanctions now delivers the regime the financial lifeline the IRGC consolidation is betting on, and it does so without removing the HEU from Iranian territory. The IRGC got what it vetoed in Islamabad if this framework holds — enrichment preserved in suspended form, uranium physically retained, sanctions lifted. Washington gets Hormuz and a war-end. Israel gets a preemptive-strike timeline measured in years rather than months, against a regime the pressure campaign had nearly finished. Saturday's Hormuz traffic data confirms that Iran sent its own oil and Gulf partners' LPG through the strait while firing on vessels that did not pay the IRGC protection racket or carried cargo bound for parties the regime is currently punishing — a working definition of "closed to all traffic of any nationality" that only the people writing the press releases still believe.

Hamas Offers Police Rifles, Keeps the Qassam Arsenal

Hamas is apparently prepared to hand over thousands of automatic rifles and small arms belonging to its Gaza police and internal security services. If it ended there, that'd be ok. Unfortunately, they are willing to "agree to that" so long as they retain the weapons of the Izzadin al-Qassam Brigades — the group's military wing. Preliminary talks have begun with the other Gaza security agencies to transfer civil administration to the US-led Board of Peace and its technocratic committee. The IDF said Friday it expects Hamas to begin "painful" disarmament steps soon to avoid an Israeli ground return. The US expects delivery of rockets, drones, anti-tank missiles, and terror-tunnel maps by early May. Top Hamas political leaders Khaled Mashaal and Musa Abu Marzouk have already rejected the framework on record — Mashaal in Istanbul called weapons "the ummah's honor and pride" — and the Gaza officials' proposal leaves every item in the Qassam inventory untouched. COGAT

published data this weekend showing 1.5 million tons of food delivered to Gaza since the October 2025 truce. Averaging 600 trucks per day, alongside 650,000 tents and tarpaulins, 70,000 tons of hygiene supplies, 12,500 tons of medical equipment, and 6,500 trucks of winter supplies. COGAT separately pushed back on Hamas's collapse narrative: "Food is filling the markets, enough for sustained amounts of time, medical centers are active, and aid is consistently exceeding international requirements. The only real barrier? Hamas terror." At a Sa-Nur settlement reestablishment ceremony yesterday, Finance Minister Bezalel Smotrich called on Netanyahu to order an immediate full IDF conquest of Gaza including the central camps, citing Hamas's refusal of Trump's disarmament ultimatum.

ASSESSMENT

The offer is the refusal. Hamas is prepared to give up the weapons of the arm that collects taxes and sweeps streets — the arm that is supposed to be replaced by whatever technocratic committee the Board of Peace installs anyway. The Qassam Brigades, the actual military wing, the organization that planned and executed October 7, stays intact. This is the Hezbollah model routed south: civilian arm nominally folded into state structures, military arm operating in parallel under its own command with no realistic path to disarmament, and the international community agrees to call the arrangement governance. Mashaal and Abu Marzouk say it out loud in every language available to them. Gaza officials are offering a ritual — hand over the visible guns, keep the real ones, let the Board of Peace issue press releases. [Which, to be clear, is not disarmament.] COGAT's numbers exist to contest the Hamas-aligned narrative that Gaza is collapsing under Israeli restriction, and the numbers happen to be correct. The markets are full. Hamas is diverting what it can divert and running its tax apparatus off what it cannot. Smotrich's call at Sa-Nur is the position of a coalition faction reading the data correctly. The Board of Peace framework rewards Hamas for rejecting disarmament by giving it a six-to-eight-month runway through the two election cycles that matter to Hamas's survival. The question the security cabinet faces this week is whether the runway lapses on its own timeline or collapses by force of arms.

Inside Israel

Justices Try to Bypass Levin by Sending Their Own Candidates to the Gazette

Justice Minister Yariv Levin on Friday submitted a proposal to the Judicial Selection Committee focused on traffic, family, youth, and magistrates' courts — the chronically under-resourced tiers where vacancy backlogs fall hardest on ordinary Israelis — with a May 3 candidate submission deadline, the statutory 45-day publication window, and a June 7 committee meeting. Levin made clear he would not open Supreme Court appointments while his prior nominees remain blocked by what he described, accurately, as a political veto inside the selection process. Supreme Court President Isaac Amit, Deputy President Noam Sohlberg, and Justice Dafna Barak-Erez released a letter Sunday accusing Levin of selectively advancing some appointments while blocking broader staffing, attached their own nationwide vacancy map, and — citing the Courts Law — sent the Judges Division their own proposed list of

district-court candidates, calling on Levin to publish that list in the official gazette immediately and convene five committee meetings in a two-week window devoted solely to selections. Levin has long argued the appointments system operates as a closed guild and that his candidates would diversify the court ideologically. Critics, including Attorney General Gali Baharav-Miara, have argued he invented a veto for himself by refusing to convene the committee. Sohlberg, widely viewed as one of the court's more conservative senior justices, signed alongside Amit — giving the letter procedural weight inside the bench.

ASSESSMENT

Three sitting justices drafted their own candidate list, routed it through the Judges Division, and demanded the justice minister publish it in the official gazette — a step no judicial bench has previously asserted it was entitled to take. The letter cites the Courts Law. The Courts Law does not grant the court the authority to supply its own nominees when the minister declines to act. Levin's argument is correct and has been for years. Every senior conservative candidate he has attempted to elevate has been treated by the selection committee as ideologically disqualifying, a pattern the Attorney General has declined to restrain and the current bench has accepted as functional status quo. [The "closed guild" Levin describes is a structural description backed by data the justices themselves do not to dispute.] The first-stage reform Levin is actually proposing — filling magistrates', traffic, family, and youth positions where shortages affect ordinary Israelis' case timelines — is a narrow administrative fix the court has spent years telling the political echelon it needs. Now that the political echelon has proposed it, the court has responded by demanding the broader Supreme Court appointments fight the justice minister has specifically set aside. Sohlberg's signature is real institutional weight, but it reflects a procedural alignment — the bench defending committee-convening prerogatives. The coalition's coming move is predictable: legislation that formalizes the lower-court reform Levin has already proposed, strips the court of the authority it asserted this weekend to generate its own candidate list, and reopening the Supreme Court appointments question through a committee structure. That is the fight the 2023 reform tried to have before the war interrupted. The letter Amit, Sohlberg, and Barak-Erez released Sunday will accelerate its return to the agenda.

Unit 4000 Exposed as Two More Israelis Are Indicted for Iranian Handling

The Mossad, Shin Bet, and IDF jointly disclosed today the full structure of the IRGC's overseas terror apparatus — Unit 4000, previously compartmentalized, headed by Special Operations chief Rahman Mokadam, who ran recruitment of operatives and smuggling of weapons into Israeli territory. Operation Roaring Lion's February-March strikes eliminated Mokadam alongside IRGC Intelligence Protection Organization chief Maj. Gen. Majid Khademi, Unit 4000 senior officer Mehsan Suri, and Mahdi Yeka-Dehkan — operational nickname "The Doctor" — who directed the Azerbaijan and Turkey cells. They had armed drones, cluster munitions, and explosives smuggled to cells arrested in Azerbaijan that targeted the Baku-Tbilisi-Ceyhan oil pipeline, the Israeli embassy in Baku, Baku's Great Synagogue, and leaders of Azerbaijan's Jewish community. And a Turkey network tied to Cyprus drone smuggling and reconnaissance of the Incirlik Air Base used by US and Turkish air forces. The joint statement characterized the exposure as "a distinct failure by Iran's regime to produce deniability" and a collapse of its modus operandi

of running terror while detaching itself from the consequences. Separately, state prosecutors Monday filed an indictment against Sagi Hayek, 19, of Ness Ziona, and Asaf Shitrit, 21, of Beit Oved — both accused of acting on behalf of an Iranian foreign agent for months. Hayek allegedly agreed to training in an Arab country, recruited Shitrit for a follow-on task, exposed identifying details about himself and his family, and remained in contact after his family received direct threats from the handler. Recent related cases include a 14-year-old from central Israel recruited through Telegram and paid in cryptocurrency for graffiti and filming assignments near Ichilov Hospital and the Kirya area, a Rishon Lezion man filming outside former Prime Minister Naf-tali Bennett's home, and a Nazareth woman filming intelligence assignments after being recruited on Telegram.

ASSESSMENT

The Unit 4000 exposure is calibrated to do two things at once. The first is operational: the apparatus Iran built to conduct plausibly deniable terrorism abroad is now traceable to command, operators, and support networks across three countries, and Tehran's modus operandi of running terror while pretending it is not running terror collapses in the open. [The joint statement's phrasing — "a distinct failure by Iran's regime to produce deniability" — is bureaucratic understatement doing real work.] The second is strategic: the timing contests the framing that Operation Roaring Lion was only about centrifuges and missiles. Jerusalem is saying that the IRGC command structure had already planned to kill Jews and bomb Western infrastructure from Azerbaijan to Cyprus to Incirlik, and some of the targets the IAF struck on February 28 were addressing the program. The Hayek-Shitrit case is a domestic counterpart. An Iranian handler runs a nineteen-year-old through Telegram, offers payment, asks him to travel to an Arab country for training, recruits his friend, and continues the contact after threatening the young man's family. This is volume recruitment, not sophisticated tradecraft. It targets Israelis young enough that loyalty is available for purchase and naive enough that they believe the handler when he promises they will not be caught. Shin Bet revealed a 400% year-over-year recruitment spike. Iran cannot project power into Israel through missiles anymore because it does not have the missiles, and it cannot run terror cells through Unit 4000 anymore because that unit's senior officers are dead. What it still has is a functioning Telegram channel and a nineteen-year-old in Ness Ziona who thought the money was good. The security establishment's warning — severe prosecution — is correct. It is also a backstop, not a solution. Dealing with the regime that runs Unit 4000 is the solution, and the regime is still in Tehran.

Kiryat Shmona Takes Its Strike to the US Embassy

Kiryat Shmona Mayor Avichai Stern led dozens of residents of Israel's northernmost city in a Sunday protest outside the US Embassy in Jerusalem against Trump's Lebanon truce, with the municipality arranging ten buses, shutting down its schools, and suspending most other services as part of a partial strike. The municipality's statement named what the framework actually is: "The agreement that is taking shape, under American leadership and Iranian initiative, serves as a political achievement for the Lebanese government ahead of the elections this May. We are not anyone's pawns." Stern is a Likud mayor in a city that gave Likud 49% of its vote, leading his own residents against his own party's prime minister's signed truce — a measure of how badly this particular deal is being read on the ground where it will be paid

for. Roughly a third of the city's pre-war 26,000 residents have not returned since October 2023. (More than 60,000 northern civilians were evacuated that month when Hezbollah began firing on northern communities in solidarity with Hamas, and some of those evacuees are still evacuees some 30 months later). Education Minister Yoav Kisch objected to the strike's education component, telling Army Radio that children should not be taken hostage to political protest — a position that misses its own argument, since the children of Kiryat Shmona have already spent 30 months hostage to a war the state has not yet finished. Democrats chair Yair Golan — normally no ally of Likud or the Upper Galilee forum — backed the residents directly: "They are absolutely right. This city is empty, 40 percent of its residents have left and will probably not return." Moshe Davidovich of the Forum of Front-Line Communities summarized the position in one line: agreements "signed in Washington" are "paid in blood." Netanyahu's February cabinet meeting held in Kiryat Shmona produced a rehabilitation plan — \$181 million toward Tel Hai College's promotion to university status, new housing, transportation, and medical infrastructure, and reopening the municipal airport after 20 years of closure. Separately Sunday, the Education Ministry announced mandatory nationwide school reopening — including northern border schools — for the first time since February's war activation.

ASSESSMENT

Kiryat Shmona is right. This truce was not negotiated because the military situation required it. It was accepted because Washington made it the price of reopening Hormuz, and the Trump administration needed the opening more than Jerusalem needed the truce. The residents refusing to quietly acquiesce to that trade are the same residents who have carried this war on their roofs for 30 months, whose children have spent those months in bomb shelters and displaced-family apartments, and whose case for finishing what the IDF started in Lebanon is written into the 8,000-plus missing population the municipality can no longer count on returning. [The people most qualified to say when a northern war is over are the people who live under the rockets. The people signing the truce are not those people.] Stern's specific charge — that the framework is calibrated to the Lebanese May election calendar, not to Hezbollah's battlefield position — is analytically correct. The 162nd Division's depopulation of pro-Hezbollah villages south of the Yellow Line is a real achievement, and it addresses the short-range anti-tank missile threat that forced the 2023 evacuation. It does not address the rockets and drones that can still be fired from north of the Litani at the same communities. A truce that leaves that capacity in Hezbollah hands is a truce that leaves the 8,000 missing residents with nothing to return to that they did not already have when they fled. The Netanyahu rehabilitation plan is serious money and serious commitment, and delivering on it will take years. The first condition of delivering on it is that the communities on the receiving end are safe enough to rebuild. Kisch's objection to the school strike — the education minister treating a municipal protest as an education-system question — is, at best, tone-deaf when the residents are explicitly saying their security is the education system's precondition. The Education Ministry opened schools nationwide Sunday because the war is officially over. Kiryat Shmona kept its own schools closed the same day because the war is not over for the people living under its remaining range. Between those two positions, one is being spoken by people whose homes are in central Israel and the other by people whose homes are within Hezbollah's Burkan and drone envelope. The residents are the ones paying. They have earned the right to speak, and the state owes them the war's completion before it owes anyone a photo-op.

Israel and the World

Luxembourg Convenes Post-Orban as the Petition Crosses 1.1 Million

The EU Foreign Affairs Council meets tomorrow in Luxembourg for the first time since Viktor Orban's April 12 election defeat, with suspension of the EU-Israel Association Agreement back on the agenda and a European Citizens' Initiative petition demanding the same having crossed 1.1 million verified signatures — one of only sixteen such petitions to reach the one-million threshold in 14 years, obliging the European Commission to formally consider the demands. Organizers — left-wing European Parliament parties who launched the initiative in January citing Israel's Gaza operations and alleging international-law violations — are pushing for 1.5 million raw signatures to guarantee at least one million verified. Spain, Ireland, Slovenia, and other critics plan to raise full suspension Tuesday. Spanish Prime Minister Pedro Sanchez publicly called last week for suspension, accusing Israel of "breaching international law again and again." [This from the same man who said he wished he could use a nuclear bomb on Israel.] Last September's partial-suspension push by Commission President Ursula von der Leyen was blocked by Hungary, Italy, Germany, and Austria — a blocking group that required each member to hold. Peter Magyar's Tisza government in Budapest has not publicly defined a cohesive Israel position but has simultaneously committed to being "a friend of Israel," to closer EU cooperation, and to reversing Hungary's withdrawal from the ICC — a withdrawal that becomes permanent June 2. Italian Prime Minister Giorgia Meloni announced Rome will not renew the two-decade Israel-Italy defense cooperation agreement. Germany, previously in the blocking group, is increasingly reweighting around concerns over settlements and the Death Penalty for Terrorists Law. A qualified-majority Council vote to suspend the Association Agreement requires two-thirds of EU population. Full suspension would cost Israel some \$1 billion annually.

ASSESSMENT

Orban was the veto. Everything the ECI petition, Sanchez's foreign ministry, and the Commission's suspension faction have assembled over the past year was blocked from advancing by Budapest, and that government no longer exists. [Architecture that depended on one man's obstruction was, predictably, architecture that could not survive the one man's departure.] Magyar has told Brussels what Brussels wanted to hear — friend of Israel, friend of the EU, ICC reversal committed — and the contradictions in that triangle are Tuesday's working material. The ICC walkback is the cheapest public deliverable, requires no cost to Hungarian trade or security, and returns the Netanyahu warrant to EU enforcement territory. It also unblocks the Judea and Samaria sanctions package 26 states have been holding behind the Hungarian veto. The Association Agreement suspension requires a qualified majority — two-thirds of EU population — which Germany's historical position was built to prevent. What has changed is Berlin's willingness to hold that line under the accumulated pressure of the Iran war, the Gaza operation, and the dossier of Judea and Samaria issues Brussels has been quietly assembling. The 1.1 million signatures do not bind, but they force a Commission hearing. Spanish, Irish, and Slovenian ministers can now point to a verified European popular mandate at precisely the moment Magyar decides whether to hold Orban's line or trade it for rule-of-law credentials. [The bet Tisza is making is that it can perform institutional reconciliation loudly enough that Brussels will not inspect the performance.] That is the working hypothesis Tuesday will test. Italy's defense-agreement non-renewal is already priced in. Germany is the hinge. The question Luxembourg answers is whether the qualified majority mathematically exists, and whether governments relieved of Orban's veto still want to be the bloc that uses it.

Milei Signs the Isaac Accords and Opens Argentina's Jerusalem Embassy

Argentine President Javier Milei and Prime Minister Benjamin Netanyahu signed memorandums of understanding last night on security and artificial intelligence cooperation and announced the launch of the “Isaac Accords” — a US-backed framework modeled on the Abraham Accords aimed at extending normalization and strategic partnership into Latin America. Milei formally opened Argentina's embassy in Jerusalem during the visit (his third visit to Israel in as many years), and announced a direct El Al route between Ben Gurion and Buenos Aires launching this fall — supported by a dedicated Israeli government budget. Netanyahu accompanied Milei to the Independence Day torch-lighting rehearsal — Milei is the first foreign leader ever selected to light a torch, in recognition of his designation of the IRGC, Hezbollah, and Hamas as terrorist organizations; his efforts related to hostage release; and his advocacy against antisemitism in international forums. He is set to attend the rehearsal rather than the official Tuesday-evening ceremony and return to Buenos Aires Tuesday afternoon. Milei's first stop on arrival was the Western Wall. During the visit he also receives the Presidential Medal of Honor from President Isaac Herzog, an honorary doctorate from Bar-Ilan University, and visits Hebron Yeshiva and the Church of the Holy Sepulchre. An agreement between UTN Argentina and the Technion is also being signed. Argentina expelled the Iranian envoy from Buenos Aires earlier this month following its support for the US-Israeli war on Iran; Milei declared two days of national mourning last year for the Bibas children murdered in Gaza captivity and renamed a Buenos Aires street from “Palestine” to “Bibas Family.”

ASSESSMENT

The Isaac Accords do two things the Abraham Accords cannot. They extend Israel's formal strategic partnership framework into a hemisphere Abraham never touched, and they do so through a head of state whose alignment with Israel is not a product of transactional calculation but of personal and intellectual conviction — a Catholic who studied Tanakh with a rabbi he later named ambassador, and who designates the IRGC as a terrorist organization because he read the record, not because the Gulf Arab neighborhood required it. [Milei's visit arrives precisely as Israel's European relationships are actively deteriorating. The timing and the framing are not accidental.] The AI and security MOUs are infrastructure. The Isaac Accords framework is architecture. Argentina is not a strategic counterweight to Saudi Arabia or the Emirates in industrial or military terms, but it is a counterweight in something Jerusalem needs more than steel — legitimacy in international forums, reliable voting partners at the UN, and active Latin American leadership against the Lula-Ramaphosa axis. That axis convened in Barcelona this weekend under Alex Soros's banner. Milei is now the formal counter-pole to it. The El Al direct route, the Jerusalem embassy opening, the Bar-Ilan doctorate, the torch-lighting — individually each is symbolic; together they are a statement of bilateral investment other Latin American governments will read. The outstanding question is whether Isaac Accords cohesion depends on Milei's specific political longevity in Buenos Aires or on infrastructure deep enough to outlast it. The MOUs argue for the latter; the torch-lighting for the former.

Barcelona and Michigan Progressives Find Their Platform

Michigan Democrats on Sunday nominated Dearborn attorney Amir Makled — who has a history of sharing pro-Hezbollah and antisemitic tweets — as a candidate for the University of Michigan Board of Regents, displacing Jewish incumbent Jordan Acker. Acker's home was repeatedly targeted by anti-Israel activists in 2024 in incidents university leadership described as antisemitic. He had supported disciplining anti-Israel encampment participants and opposing divestment. Fellow incumbent Paul Brown, who took similar positions, was also nominated and will advance with Makled to November. Makled ran on a Board-of-Regents divestment platform and previously represented a student arrested during the 2024 Michigan encampment. The nomination came as the inaugural Alex Soros Global Progressive Summit convened over the weekend in Barcelona, hosted by Spanish Prime Minister Pedro Sanchez, who calls for downgrading EU-Israel ties. Attendees included South African President Cyril Ramaphosa — whose government petitioned the ICC against Israeli leaders — Brazilian President Luiz Inacio Lula da Silva, UK Justice Secretary David Lammy, Minnesota Governor Tim Walz, Senator Chris Murphy (D-CT), Israeli Arab MK Ahmed Tibi, former PA Prime Minister Mohammed Shtayyeh, Center for American Progress CEO Neera Tanden, and former Corbyn adviser Owen Jones. Video messages came from Senator Bernie Sanders, NYC Mayor Zohran Mamdani, and former Secretary of State Hillary Clinton. What a group. Murphy framed Trump as a totalitarian takeover in progress. Lula called on UN Security Council members to “stop this madness of war.” Sanchez targeted “the dangerous normalization of the use of force” — a Spain-coded reference to the Iran war. Foreign Minister Gideon Sa'ar responded to Sanchez's EU-downgrade call by noting Spain's ties to Erdogan's Turkey and Maduro's Venezuela, “a government that receives

thanks from Iran's brutal regime and terrorist organizations and has dedicated itself to spreading antisemitism." Soros has publicly praised Spain for refusing to let US forces use its bases during the Iran war and reprimanded other European governments for the opposite choice.

ASSESSMENT

Barcelona and Michigan are facets of the same project. Barcelona produces the communique. Michigan produces the replacement of a Jewish incumbent who defended Israel with a lawyer who praised Hezbollah on X. Both are recruitment and credentialing operations — Barcelona for heads of state and senior legislators, Michigan for the next generation of state-level Democratic officeholders — and both run on the proposition that opposition to Israel is no longer a niche progressive preference but the organizing principle of a serious international political coalition. [The guest list Soros assembled — a sitting South African president whose government is prosecuting Israeli leaders at the ICC, a Spanish prime minister calling for trade-boycotting Israel, a Brazilian president who has compared the Gaza war to the Holocaust, a UK justice secretary whose government has throttled Israeli arms exports — forms a cabinet of Jew-haters.] Murphy's "totalitarian takeover" framing of Trump is the American domestic rhetoric that lets the international cohort position anti-Israel policy as democratic self-defense rather than foreign-policy preference — the same rhetorical move Bernie Sanders executed on the Senate floor to try to block Israeli arms sales. Michigan's Democratic electorate voted to elevate a lawyer who praised Hezbollah over a Jewish incumbent who defended Jewish students during the 2024 encampments. That is the sub-national version of what Barcelona produced in ministerial form. The J Street line — that Israeli missile defense should not be of concern to anyone outside of Israel — has moved from an edge position into one of the two main Democratic primary lanes, and the 2028 presidential field is sorting itself against it. The lesson Luxembourg will extract from Barcelona on Tuesday is that European popular-vote politics now ratify the pro-suspension position. The lesson Washington should extract from Michigan is that Democratic primary politics now ratify the anti-Zionist one. Both lessons are visible. Both are being acted upon. What remains is whether any functioning coalition on either side of the aisle is willing to say so out loud while the election cycles still allow it.

Briefly Noted

Frontline & Security

- *Israel National News*: Following operational and intelligence assessment, the IDF confirmed Sunday that a Hezbollah terror cell opened fire on UNIFIL peacekeepers clearing unexploded ordnance near Al-Ghandouriyah Saturday, killing one French peacekeeper and wounding three others, two seriously.

Diplomacy & Geopolitics

- *Jerusalem Post*: IRGC Quds Force commander Esmail Qaani made his first trip outside Iran since Operation Roaring Lion's February 28 start, meeting Shia militia leaders and the Iran-aligned Coordination Framework in Baghdad on consensus candidates for Iraqi prime minister, including proposals to formally integrate the Kataib Hezbollah-led militias into state

security institutions. This is Tehran's regional proxy apparatus being re-consolidated through one political system where it still has majority-bloc leverage.

- *Jerusalem Post*: Turkey, Syria, and Jordan announced a joint plan to develop a Europe-to-Gulf rail corridor running from the Mediterranean through Ankara, across Syrian territory, and south into Jordan — building on a trilateral MOU signed earlier this month and explicitly marketed as an alternative to Russian, Iranian, and maritime-chokepoint routes. Erdogan's Levantine bid to position Turkey as the region's indispensable transit hub — and to route trade through three capitals rather than through Saudi Arabia, the UAE, or the IMEC corridor Israel is meant to anchor — is a play to shape regional alignment for decades and warrants more Jerusalem attention than it has received.

Domestic & Law

- *Ynet*: Hundreds attended the reestablishment ceremony Sunday of Sa-Nur in northern Samaria — evacuated under the 2005 disengagement and now returned with Defense Minister Israel Katz's backing and Finance Minister Bezalel Smotrich's attendance, part of a prior 22-settlement security-cabinet approval.
- *Jerusalem Post*: The Movement for Quality Government and Forum Homat Magen LeIsrael filed a High Court petition Sunday to block IDF Maj.-Gen. Roman Gofman's June 2 installation as Mossad chief, citing former Supreme Court president Asher Grunis's dissent inside the Senior Appointments Advisory Committee over the Elmakayes affair — an unauthorized IDF-linked influence operation using a minor, conducted while Gofman commanded the 210th Bashan Division. The petition is lawfare's second front this week: the same litigation ecosystem running at Ben-Gvir is now running at the civilian Mossad chair, with Attorney General Gali Baharav-Miara named as a respondent who will nonetheless control the state's response.

Culture, Religion & Society

- *JNS*: Over 100 drivers, some waving Palestinian flags, staged a drag-racing street takeover in Queens early Saturday, with several participants jumping on an NYPD cruiser and cracking its windshield before fleeing as officers dispersed the crowd. UN Ambassador Danny Danon captured it thusly: "Riots with Palestinian flags — not in Gaza, but in Queens in New York" — the street-politics version of the Mamdani administration Queens voters just elected.
- *JNS*: Israeli Ambassador to Sweden Ziv Nevo Kulman publicly called out Stockholm authorities for tolerating weekly acts of open antisemitism on the city's streets, including a staged protest scene depicting a kippah-wearing, blood-covered Jewish man threatening to slit a Palestinian woman's throat while the crowd chanted for the crushing of Zionism. The ambassador's closing line — "This is Europe, 2026" — will be formally ignored at Luxembourg's Tuesday foreign ministers' meeting.

- *The Jewish Agency*: The Jewish Agency's first comprehensive "One People" global Jewry report — a survey of 1,428 Jewish adults across four continents in September–October 2025 — found 69% of Global Jewry and 79% of Israelis name antisemitism as the single greatest challenge, 43% of European Jews personally encountered antisemitism in the past year, and only 22% of French Jews feel safe in their country. 56% of European Jews have discussed aliyah in their homes (64% in the UK), and 44% of Global Jewry plan to visit Israel in the coming years (71% among Europeans) — the aliyah pipeline and the communal-tie pipeline showing up in data at exactly the moment the governments those Jews live under are throttling both.

Developments to Watch

Judea & Samaria

- **Sa-Nur as opening move, not endpoint** — Sa-Nur's Sunday reestablishment is the second of 22 settlements the security cabinet approved last year to return to the map. Defense establishment resistance on the remaining 20 is the hinge.
- **PA land-registration enforcement ramps** — The cabinet directive halting Palestinian Authority registration work in Area C now instructs security forces to block foreign assistance to those efforts and strips legal standing from PA documents in Israeli procedure. The enforcement architecture is built. What it produces on the ground over 30–60 days is the test.

Northern Front (Lebanon / Syria)

- **Qassem's "let the field speak"** — Hezbollah Secretary-General Naim Qassem rejected negotiations this week and declared the organization will "let the field speak" — doctrinal language Hezbollah uses to authorize kinetic activity. **LIKELY TO ESCALATE**
- **Hezbollah displaces fire to Syria** — A Hezbollah plot to launch rockets at Israel from inside Syrian territory was disrupted before execution, with IDF assessment the group is displacing fire outside Lebanese borders to stay within truce text.

Gaza & Southern Theater

- **Early-May disarmament delivery window** — Washington expects Hamas to hand over rockets, drones, anti-tank missiles, and terror-tunnel maps by early May — roughly two weeks out. Mashaal's on-record refusal and the Qassam Brigades' intact arsenal make delivery theatrical. The cabinet's decision comes when the window closes.
- **Smotrich builds Gaza-conquest pressure** — Finance Minister Bezalel Smotrich's Sa-Nur call Sunday for full IDF conquest of Gaza including the central camps is positioning for the coalition vote that follows the Board of Peace timeline's collapse.

Regional Axis (Iran, Houthis, Militias)

- **Tuesday night Iran cliff** — Trump's two-week US-Iran truce expires Tuesday night with Iran formally refusing the Islamabad second round. The Vance-Witkoff-Kushner delegation still flies. Israeli officials have been told to prepare for large-scale renewed hostilities including a potential Iranian surprise attack. **LIKELY TO ESCALATE**
- **Aman's missile-volume red line** — The Intelligence Directorate has drawn a threshold at which Iranian ballistic missile accumulation would overwhelm existing Israeli air defense. Jerusalem has made clear that reaching that threshold requires preemption. Any deal that leaves missile production unrestricted puts the red line on a calendar rather than a hypothetical.
- **Qaani Baghdad consolidation** — IRGC Quds Force chief Esmail Qaani is in Baghdad brokering consensus on Iraq's next prime minister and on formally integrating Kataib Hezbollah into state security institutions. Tehran is consolidating proxy leverage through the political system where it still holds majority-bloc arithmetic.
- **LAX Iran-Sudan weapons broker arrest** — The FBI arrested an Iranian national at Los Angeles International Airport accused of brokering thousands of weapons, bombs, and drones from Iran to Sudan — the supply-chain counterpart to the Azerbaijan Unit 4000 network Israel exposed Monday. The pipeline ran through a US transit airport, which is its own story.

The Iran truce expires tomorrow night. Hamas's disarmament window expires in early May. Gofman's Mossad installation runs against a June 2 Movement for Quality Government challenge. Aman's missile-volume red line runs on a longer calendar — thousands of ballistic missiles within a few years, at which point the preemption question stops being hypothetical. Four clocks, four different speeds, one coalition carrying all of them — being asked to produce arrangements the IDF has spent four months producing on its own terms. Whether the political track catches up before the operational one demands it has always been Netanyahu's actual election question. Tuesday night is when the country starts seeing the answer.

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