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READER EDITION

May 4, 2026

ISRAEL BRIEF

Monday, May 4

A long week ahead in a galaxy not far enough away

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THE BOTTOM LINE Serbia formalizes the Israel partnership in trade, defense, and diplomacy—actions Western Europe abandoned. Vucic's October 7 munitions assistance established the ceiling Sa'ar builds upon. Belgrade EXPO 2027 sets optics: a Slavic capital hosting world commerce while Berlin shutteres Israeli restaurants. South Sudan's framework agreement replicates the approach at smaller scale.

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Israel Brief: Monday, May 4

THE brief opens with the observation that multiple regional actors are attempting to buy time while facing unfavorable circumstances. Tehran delays on nuclear matters while its stockpile grows. The Israeli cabinet defers Gaza decisions. Beirut postpones disarmament discussions. Justice Minister Levin manages appointments strategically. Trump, notably, has abandoned the delay strategy.

FLASH BRIEF

- **Iran:** Trump initiates Project Freedom convoys through Hormuz; Tehran threatens US vessels; Treasury Secretary Bessent warns of imminent Iranian oil facility shutdown
- **Lebanon:** Reuters reports Hezbollah's "several thousand" casualties; Fadlallah pledges to obstruct Lebanon-Israel negotiations
- **Gaza:** Cabinet postpones renewal decision; IDF expands Yellow Line control to 59 percent; forces redeploy from southern Lebanon
- **Judiciary:** Levin declines judicial appointments; High Court justices cite rising crime rates; reform legislation awaits post-October implementation
- **Front line:** Cabinet transfers counterterrorism authority to IDF in 16 communities; police retain Meron tomb responsibility
- **UK:** Hall proposes march moratorium; Polanski defends police critics; Starmer denounces both positions
- **Diaspora:** Incidents in Toronto, New York subway, and Sesame Street comments reflect rising antisemitism
- **Serbia:** Sa'ar and Djuric formalize strategic partnership; Belgrade secures EXPO 2027; South Sudan framework advances

The War Today

IRAN WALLS OFF THE NUCLEAR QUESTION AS THE TANKS FILL

Tehran announced it will not discuss nuclear arrangements absent a permanent peace agreement. The revised three-stage plan, delivered through Pakistani mediators, was rejected by Trump as "not acceptable." Trump confirmed destroying roughly 85 percent of Iran's missile production capacity and sought elimination of remaining facilities. Iranian Parliament Deputy Speaker Ali Nikzad announced legislation barring Israeli vessels from Hormuz and requiring permits for others. CENTCOM ordered 49 ships to turn back. Trump launched Project Freedom today—a convoy operation escorting neutral commercial shipping through Hormuz. Iran warned that US vessels entering the strait will face fire. UKMTO reported a northbound bulk carrier attacked 11 nautical miles west of Sirik. Bessent indicated Iran will shut down oil facilities next week as storage fills. An Iranian VLCC carrying 1.9 million barrels reportedly evaded the blockade through Pakistani waters and the Lombok Strait. The regime's Mehr News called for a "wartime economy" with explicit reference to Joseph Goebbels. Netanyahu held a limited security consultation on FPV drone defense rather than convening the full cabinet on Gaza.

ASSESSMENT

Iran's nuclear stance signals what its negotiators cannot express. Storage capacity represents the actual policy constraint. Project Freedom shifts the kinetic decision from Tehran's diplomats to IRGC commanders who just threatened the convoys. Trump's rejection closes doors Iran hoped to keep open during rebuilding.

HEZBOLLAH'S TOLL SURFACES AS FADLALLAH VOWS TO BLOCK LEBANON-ISRAEL TALKS

More than a dozen Hezbollah officials admitted to Reuters the war cost the group “several thousand fighters.” Hezbollah’s media office disputed the figure. Lebanon’s health ministry reported more than 2,600 dead since March 2, with approximately one-fifth being women, children, and medics. The ministry does not distinguish combatants from civilians. Fresh graves filled in Hezbollah-controlled southern Beirut suburbs after the April 16 ceasefire. Yater village recorded 34 fighter deaths. Hezbollah MP Hassan Fadlallah vowed the group will “thwart” direct Lebanon-Israel talks. Naim Qassem called such talks a “sin.” Hezbollah operatives launched rockets and explosive drones at IDF troops over the weekend; one rocket was intercepted near Avivim. The IDF dismantled an 80-meter Hezbollah tunnel in the eastern sector. Soldiers located more than 100 Hezbollah weapons across southern Lebanon. Israel reports 17 soldiers killed in southern Lebanon since March 2 and two civilians killed in the north.

ASSESSMENT

The casualty disclosure informs Hezbollah's constituents of the war's price. Fadlallah's pledge formalizes what parliamentary blocking already announced—Aoun cannot speak for Hezbollah-controlled territory. Losses damaged the group, but Tehran controls the calculation.

CABINET HOLDS GAZA DECISION AS IDF REPOSITIONS SOUTH

The security cabinet’s promised Gaza decision did not materialize. Senior IDF officials push to resume fighting, assessing the current window as the best opportunity to defeat Hamas. The IDF thins southern Lebanon forces, redeploying regular brigades to Gaza and Judea and Samaria. Southern Command’s operational plans are approved, awaiting political authorization. The Yellow Line has crept westward—IDF control reaches roughly 59 percent of the Strip, up from 53 percent at the October 2025 ceasefire. Reserve troops east of the line dismantled eight tunnel routes on their sixth deployment. The 14th Brigade rotates in. The IDF eliminated nearly 100 terrorists in Gaza in recent weeks. Reservist burden averages 80 days served per year in 2026.

ASSESSMENT

The deferral masks a campaign already underway. The IDF added six percentage points of Yellow Line control before any renewal vote. Netanyahu held a limited consultation rather than the promised cabinet session—Washington's green light has not arrived. The 80-day reservist average represents the constraint a renewal decision either accepts or restructures.

Inside Israel

LEVIN HOLDS FIRM ON APPOINTMENTS AS THE COURT LECTURES ON CRIME

The High Court questioned Justice Minister Yariv Levin's refusal to fill judicial vacancies. Justices Ofer Grosskopf and Alex Stein pressed his representative Zion Amir on 51 court vacancies, rising to 67 by year-end. Stein said crime "is running rampant." Grosskopf called the southern district "crime-ridden" with daily murders. Amir declined committing to a timeline. The Judicial Selection Committee cannot convene once the Knesset dissolves for elections, scheduled by July 27. Judicial candidate names must be published in the state gazette 45 days before committee deliberation. The last possible publication date is June 13. Levin lacks majority committee status—a structural feature designed to prevent coalition-aligned appointments. The judicial reform rebalancing the committee passed last year but takes effect after October's vote. Levin has not convened the committee since the High Court ordered him to in January 2025, boycotted that vote, and refuses to recognize Court President Isaac Amit's authority.

ASSESSMENT

Levin refuses operating a committee designed to ensure his side never wins. The legal establishment that built those rules now complains about the guaranteed vacancies. Stein's crime reference is ironic given the system producing these results. The rebalancing reform takes effect after October; Levin waits at considerable cost.

CABINET HANDS THE IDF CIVILIAN SECURITY IN 16 FRONT-LINE COMMUNITIES

The cabinet approved Defense Minister Israel Katz's transfer of counterterrorism responsibility to the IDF in 16 front-line communities. Northern Command takes nine, including Meron, Beit Jann, and Bar Yohai. Central Command takes seven, including Degania Alef, Degania Bet, and Menahemia. Communities were selected by border distance and threat level, not police station proximity. Israeli police retain civilian responsibilities, including public order and criminal response. Police continue holding the Meron tomb of Rabbi Shimon bar Yochai, Lag B'Omer's pilgrimage site. The Defense Ministry committed NIS 42 million across 2028–2030; the National Security Ministry adds NIS 18 million.

ASSESSMENT

Policy finally reflects October 7's lessons. Counterterrorism in front-line communities belongs to the IDF. Gaza envelope defenders died in the responsibility gap. The 2028–2030 funding timeline shows responsibility shifts now, resourcing follows in two years. Meron's police carve-out maintains the religious site's civic order while the IDF wraps the perimeter.

Israel and the World

UK CONSIDERS A MARCH MORATORIUM WHILE THE GREENS DEFEND POLICE CRITICS

The UK's independent terror legislation reviewer, Jonathan Hall, called for a moratorium on anti-Israel marches following the April 29 stabbing of two Jewish men in Golders Green. Essa Suleiman was charged with attempting to

murder Shloime Rand and Norman Shine. The stabbing followed the March 23 torching of four Hatzola ambulances in the same area. A “Nakba Day” rally on May 13 sits in the immediate window. Prime Minister Keir Starmer indicated willingness to ban some anti-Israel marches. Conservative leader Kemi Badenoch said the marches “are used as cover for promoting violence” against Jews. Met Police counterterrorism head Laurence Taylor confirmed all upcoming events are under review, including Tommy Robinson’s planned September Unite the Right follow-up. Green Party leader Zack Polanski apologized for sharing a post critical of arresting officers, then told the BBC he “remains concerned” about police conduct. Transport Secretary Heidi Alexander said she could have acted similarly if arresting the stabber. Starmer called Polanski “disgraceful” and “not fit to lead.”

ASSESSMENT

Hall’s call provides Starmer establishment cover if used. The Polanski-Alexander split tests factional strength. A Cabinet minister would have kicked the stabber; the Green leader still defends critics. The May 13 decision tests whether the moratorium carries weight beyond headlines.

TORONTO GUNFIRE, NY SUBWAY HATE MARK ANOTHER DIASPORA WEEK-END

Toronto Police search for a suspect who shot “visibly identifiable” Jewish victims with a gel blaster on April 30. Both sustained minor injuries. Multiple synagogues and Jewish schools sit within blocks. The Centre for Israel and Jewish Affairs called it part of a threatening wave. Toronto police data: 81 percent of religiously motivated hate crimes target Jews, who comprise 3.6 percent of the city. New York City Subway graffiti read “The only good Zionist is a dead one.” NYPD data: 57 percent of New York’s hate crimes were antisemitic in 2025; 55 percent in Q1 2026. Commissioner Jessica Tisch noted the figure spans symbol-drawing through physical violence. Sesame Street’s American Jewish Heritage Month repost drew Hitler Youth comparisons in comments. Dan Bilzerian, with thousands of likes, wrote against “Jewish supremacy nonsense.”

ASSESSMENT

Jews represent 3.6 percent of Toronto, drawing 81 percent of religiously motivated hate crime. In New York, Jews comprise 10 percent yet draw 55 percent of hate crime overall. Sesame Street comment threads carry Hitler Youth references under children’s content. Bilzerian’s reach scales ambient antisemitism into a permission structure. The broader recognition of what is occurring remains insufficient.

SERBIA LOCKS IN STRATEGIC PARTNERSHIP AS WESTERN EUROPE PULLS BACK

Serbian FM Marko Djuric and Israeli FM Gideon Sa’ar concluded the first Israel-Serbia Strategic Dialogue in Jerusalem. The framework formalizes defense, trade, technology, and diplomatic cooperation. Trade tripled over four years; Israel is Serbia’s leading Middle East export destination. The governments negotiate a free-trade agreement, build a Joint Economic Committee, and establish an Israel-Serbia Chamber of Commerce. Israel-Serbia direct

flights expand to five weekly. Serbian President Aleksandar Vucic coordinated munitions supplies after October 7, drawing European criticism. Djuric's cousin Alon Ohel was held hostage for two years before October 2025 release. Belgrade hosts EXPO 2027. Sa'ar will bring South Sudan's framework cooperation agreement to government approval shortly.

ASSESSMENT

Serbia formalizes the Israel partnership in trade, defense, and diplomacy—actions Western Europe abandoned. Vucic's October 7 munitions assistance established the ceiling Sa'ar builds upon. Belgrade EXPO 2027 sets optics: a Slavic capital hosting world commerce while Berlin shuttered Israeli restaurants. South Sudan's framework agreement replicates the approach at smaller scale.

Briefly Noted

FRONTLINE & SECURITY

- **Jerusalem Post:** Shin Bet, IDF, and Israel Police indicted five suspects in a drone gun-smuggling network from Jordan into Judea and Samaria, running 44 pistols before carriers were caught mid-operation
- **Israel National News:** Boeing's first KC-46 "Gideon" refueling aircraft completed initial testing; IAF delivery expected within a month (first of six force multipliers)
- **Jerusalem Post:** Jordan conducted pre-dawn airstrikes against weapons and Captagon sites in Druze-controlled Sweida—its third operation in a year, enforcing redlines on smuggling networks

DIPLOMACY & GEOPOLITICS

- **Jerusalem Post:** Argentina revives Falklands sovereignty claims under Milei as Washington reassesses automatic UK alignment; Hegseth's transactional doctrine applies similar logic to Israel
- **Jerusalem Post:** Australia's Royal Commission on Antisemitism and Social Cohesion opens first hearings today through May 15, defining antisemitism and examining current forms

DOMESTIC & LAW

- **Jerusalem Post:** Israel Hofsheet petitioned High Court over housing-loan and youth-organization funding formulas favoring haredi families; state must respond before Knesset dissolution
- **Jerusalem Post:** Police thwarted 21 suspects bringing a goat to the Temple Mount for Pessah Sheni sacrifice; magistrates ordered release; district court rejected police appeal
- **Times of Israel:** AG Baharav-Miara expects to indict Netanyahu's chief of staff Tzachi Braverman, the incoming UK ambassador, within weeks

Developments to Watch

NORTHERN FRONT (LEBANON / SYRIA)

- **Israel's two-week Lebanon window:** Israel set a roughly two-week negotiation window through mid-May. Fadlallah's pledge and Berri's parliamentary blocking foreclose the path Aoun was supposed to walk

- **Syrian air defense reconstitution:** IAF officers assess Syria gradually rebuilds radar and air-defense systems. Whether the buildup crosses Israel's threshold determines IAF freedom when the next Iran round requires Syrian airspace use

REGIONAL AXIS (IRAN, HOUTHIS, MILITIAS)

- **UK IRGC proscription window:** Starmer pledged IRGC proscription legislation in the next parliamentary session; AFP investigates Iranian embassy Telegram activity. The designation and diplomat expulsion window remains open
- **UAE-Saudi divergence widens:** UAE OPEC withdrawal took effect May 1; MBZ adviser Amjad Taha teased "another historical day" from Abu Dhabi. Saudi response within days determines whether Riyadh accepts divergence or counters
- **Iraqi cabinet formation:** Coordination Framework PM-designate Ali al-Zaidi has roughly four weeks to produce a cabinet. His US-sanctioned bank and IRGC-laundering allegations frame whether Tehran's preferred Baghdad outcome consolidates

DIPLOMATIC & LEGAL

- **Hesse criminalization vote May 8:** Hesse targets VE Day passage of legislation criminalizing denial of Israel's right to exist, with up to five years' imprisonment—first European jurisdictional test of such protection
- **Sumud flotilla detention hearing tomorrow:** Brazilian Thiago Avila and Spaniard Saif Abu Keshek face detention review; Spain and Brazil call detention illegal. The Adalah-led defense routes the case into standard lawfare networks
- **Ukraine sanctions package timing:** Zelensky said Kyiv prepares sanctions against Israeli grain transporters and Russian-occupied-territory shipment beneficiaries. Arrival within 1–2 weeks determines whether Israel-Ukraine relations break or recalibrate

Closing Statement

The audits keep landing and the reformers keep getting attacked for running them. Hall's moratorium call, the cabinet's IDF transfer, Sa'ar's Serbia framework, Levin's wait for the post-October rules — every one of them is the institution doing what the post-October 7 reality forces, in the face of an establishment still running the pre-October 7 playbook. Trump is keeping pressure on Tehran while Tehran's tanks fill. The actors who thought the clock was their friend are discovering whose clock it actually was.

— Uri Zehavi • Intelligence Editor With Modi Zehavi • Data + Research Analyst

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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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