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READER EDITION

May 11, 2026

ISRAEL BRIEF

Monday, May 11

The framework written on Pakistani paper collapses while the strike map rewrites south Lebanon. The Yellow Line consolidates underneath. The AG petitions Bagatz to override the committee she defends.

◇ URIEL ZEHAVI

THE BOTTOM LINE Foxman z”l spent a career arguing that antizionism was antisemitism in a register the institutional Jewish world found uncomfortable until the evidence stopped permitting the comfort. The architecture he built is being tested today against a threat environment he named in the 1990s and the federations spent the 2000s discounting — Iranian network operations routed through campus and TikTok, synagogue shootings working through Toronto and Manchester and Sydney as a pattern rather than as incidents. The harder reading is that the institutional consensus Foxman z”l was fighting to move has lost two decades it could have spent treating Iranian proxy ops as the state-sponsored network they always were.

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Israel Brief: Monday, May 11

BOKER tov, friends.

The mutual rejection landed before dawn. Trump turned down the Iranian reply to the fourteen-point framework. Within the hour Tehran rejected Trump's terms as a "surrender condition." Khamenei's ten-point Hormuz "doctrine" [coming from a navy already pulled apart by F/A-18s] narrates survival as victory. The IAF hit twenty-plus targets across south Lebanon and pulled nine western Bekaa villages into the evacuation zone. Alexander Glovanyov z"l fell to a Hezbollah drone. In Jerusalem the Attorney General petitioned Bagatz to override the Grunis Committee. It is the same committee she defends in her opposition to the Appointments Law.

FLASH BRIEF

- **Iran framework collapses:** Trump rejects the Pakistani-channel reply; Tehran mirrors the rejection inside the hour. *See The War Today.*
- **Hormuz doctrine:** Khamenei posts a ten-point "management" doctrine; IRGC threatens French and British warships entering the strait. *See The War Today.*
- **Glovanyov z"l:** A Hezbollah explosive drone kills a 47-year-old reservist transport driver near the northern border. *See The War Today.*
- **South Lebanon strike map:** The IAF hits twenty-plus targets, blacks out the Jezzine grid, and pulls western Bekaa villages into the evacuation order. *See The War Today.*
- **Balout confirmed:** Hezbollah channels concede the Radwan Force commander died in last week's Dahieh strike. *See The War Today.*
- **Yellow Line consolidation:** The 188th and Yahalom dismantle a four-kilometer hostage-tunnel network east of the line in southern Gaza. *See The War Today.*
- **Netanyahu on Iran:** The PM tells 60 Minutes the war with Iran is not over and aid-decoupling begins this decade. *See The War Today.*
- **AG vs. Grunis:** Baharav-Miara petitions Bagatz to override the Mossad-director appointment from the same committee she defends elsewhere. *See Inside Israel.*
- **Bennett moves on Likud:** Bennett opens a Likud-strongholds campaign as Netanyahu leans toward pulling the vote to September 1. *See Inside Israel.*
- **EU "violent settlers" package nears a deal:** Kallas tells reporters the Council is "close" on the long-deferred sanctions architecture targeting Israelis in Judea and Samaria. *See Israel and the World.*
- **Foxman z"l:** Abe Foxman, who shaped American Jewish institutional defense for a generation, has died at 86. *See Israel and the World.*
- **Reader mailbag:** A reader asks whether we are losing the Iran war. *See Reader Mailbag.*

The framework was paper. The strike map is operational. The point where the two layers meet today is the Pakistani channel. The mediators cannot bind the team "Khamenei" overrides at every step. They are asked to carry a

Lebanon ceasefire clause Iran wrote because Hezbollah cannot hold the field on its own. The IDF answered with the only enforcement instrument matching the threat tempo. Nine evacuated villages. Balout's body finally identifiable. The Khan Yunis Brigade's senior command lifted out of the tunnels they were living inside. The Attorney General's filing runs the same architecture inside the green line. The legal instrument moves against the operational one that briefs the cabinet on Iran this afternoon.

The War Today

TRUMP REJECTS THE IRANIAN REPLY AS TEHRAN MIRRORS AND HORMUZ HEATS UP

Trump rejected the Iranian response to the fourteen-point framework overnight, calling its terms unacceptable. Within an hour Tehran announced it had rejected Trump's terms — a “surrender condition,” in the Iranian phrasing. The reply moved through Pakistani mediators. It bundles a Lebanon ceasefire clause with sanctions relief, frozen-asset release, and a “mutually reopened” Hormuz, while leaving uranium enrichment and the stockpile untouched. Iran's parliamentary national-security spokesman threatened to close Bab el-Mandeb on top of Hormuz. An IRGC deputy foreign minister warned that French or British warships entering the strait would meet “a decisive and immediate response.” Khamenei posted a ten-point Hormuz doctrine declaring Iranian “management” of the strait the “harbinger of a new regional order.” Tehran's ambassador to Beijing pitched China and Russia as guarantors. Trump answered on Truth Social with his indictment of Iranian foreign policy and Obama's role in financing it. He told reporters the buried enriched uranium sits under Space Force surveillance — “if somebody gets close to that place, we'll know about it, and we'll blow them up.” He said the air campaign hit roughly 70% of its targets, with “two weeks more” available if needed. Lindsey Graham tweeted that “Project Freedom Plus” was sounding pretty good right about now. Netanyahu left a Druze community conference at the Dead Sea for a call with Trump. He appeared on CBS's 60 Minutes, where he said the war with Iran is not over, the enriched stockpile must come out, and the enrichment sites must be dismantled.

ASSESSMENT

The mutual rejection collapses the diplomatic posture back to the kinetic baseline the framework was supposed to suspend. Tehran's reply packages survival demands — lift sanctions, free the assets, reopen the corridor — with a proxy-shield clause to freeze Lebanon. Trump's 70% / two-more-weeks line is the kinetic option held visible while Witkoff's deadline runs. Netanyahu said on 60 Minutes what the operational picture already required. The uranium leaves the country or the sites get hit. The 48-hour window we've tracked sharpens against Trump's one-week bombing deadline as the response window narrows.

GLOVANYOV FALLS AS THE IDF STRIKES ACROSS SOUTH LEBANON AND CONFIRMS BALOUT

Staff Sergeant (Res.) Alexander Glovanyov z"l, 47, a transport driver in the 6924th Transport Battalion from Petah Tikva, was killed by a Hezbollah explosive drone near the Lebanese border. Hezbollah's "Communique 24" claimed two consecutive drone strikes on an IDF position at Bidar Faqani in Taybeh and another on troops at Khallet Raj in Deir Siryan. The IAF intercepted aerial targets over Israeli units operating in southern Lebanon multiple times. Zar'it and Shomera sirens triggered interceptor launches the IDF named as another ceasefire violation. The IDF spokesperson in Arabic ordered evacuation of nine villages in Lebanon — two in the western Bekaa (Klayaa, Mashghara), the rest in the Nabatieh district. The IAF struck more than twenty terror-infrastructure targets across south Lebanon through the day: Aba, Kfar Tabnit, Kfar Raman, Tul, Yahmur al-Shaqif, Shukin, Tulin, with a follow-on strike on Joz in Nabatieh. A strike on Sajd blacked out the entire Jezzine district. An earlier strike on the Kfar Reman power station near Nabatieh had already disabled local grid feed. Northern Command officers told Israeli reporters that Hezbollah attack frequency is rising faster than the public picture shows. An Israeli reservist brigadier general told Channel 14 that the most advanced Hezbollah drone tier, swarms in the hundreds or thousands, has stayed in reserve. Zamir, briefing the Foreign Affairs and Defense Committee in closed session, told members the IDF's defined goal is enabling the Lebanese government to disarm Hezbollah, with the IDF creating the operational conditions.

ASSESSMENT

The strike map writes the operational expression of the two-week window we've tracked as foreclosed. Nine evacuated villages, twenty-plus infrastructure targets, the Sajd transformer that took out the Jezzine grid, Balout's body finally identifiable. Zamir's closed-briefing distinction [said plainly: enabling-conditions IS the disarmament plan] tells the committee what the field already knows. The Lebanese state cannot disarm Hezbollah. Iran wrote the framework's Lebanon clause to do at the table what Hezbollah cannot do on the ground. And the "hundreds, thousands" warning names the ceiling Qassem will not be permitted to reach.

THE YELLOW LINE CONSOLIDATES AS THE 188TH PULLS A HOSTAGE TUNNEL NETWORK

IDF troops from the 188th Brigade and the Yahalom Unit dismantled four underground tunnel routes totaling roughly four kilometers east of the Yellow Line in southern Gaza. One route was part of a complex used to hold hostages. Another contained the living quarters of the Khan Yunis Brigade's senior command. The operation runs inside Southern Command's authorized line of effort under the current framework. Two strikes inside the past 24 hours eliminated armed Nukhba operatives moving toward IDF positions in southern Gaza. Two more eliminated operatives maneuvering near the Yellow Line in northern Gaza, both with imminent-attack profiles. Gazans report new yellow concrete barriers on the Salah al-Din axis between the north and south of the strip. The IDF continues to advance past the line at points beyond Khan

Yunis and south of Netzarim. The Kfir Brigade, working with an Air Force remote piloted aircraft, eliminated a bomb-planter in southern Gaza. In Judea and Samaria, Border Police eliminated an armed terrorist in Qalandiya in a shootout north of Jerusalem.

ASSESSMENT

Hamas cannot be trusted with a sovereign quiet zone underneath. The Khan Yunis Brigade's senior command was living inside the tunnel system. Nothing in the diplomatic posture above would have produced that intelligence. The Salah al-Din barrier extension and the Netzarim-line advances mean the operational geometry continues to move while the cabinet defers. Qalandiya is the same logic in the Judea and Samaria register [as if anyone needed another data point]. The network is still there, and the elimination tempo is the only enforcement instrument matching the threat tempo.

Inside Israel

BAHARAV-MIARA ASKS THE COURT TO OVERRIDE THE COMMITTEE SHE DEFENDS

The Attorney General's posture on the Mossad-director fight has folded in on itself. Baharav-Miara filed a High Court petition yesterday afternoon asking Bagatz to override the Grunis Committee's appointment of Roman Gofman as the next Mossad chief. Two hours later she opposed the Appointments Law — which cancels that same Grunis Committee — on the grounds that the legislation “abolishes the state-oriented and professional character of the civil service.” The committee she relies on for legitimacy is the same committee she asks Bagatz to override earlier. Netanyahu released Grunis's full opinion in response. Grunis judged Gofman unfit because the agent he recruited, Elmakais, was a minor, while explicitly conceding that the recruitment “does not constitute a breach of integrity.” David Barnea told the committee that if Gofman had been a division head under him, he wouldn't have kept the post — a service-chief's verdict on a service-internal personnel question, separable from the AG's legal frame.

ASSESSMENT

The Mossad-director appointment is the cleanest illustration to date of what we mean when we call the AG's office a coalition opposition node. The same committee she invokes as the floor of civil-service professionalism is the committee she asks the Court to override when its output is the appointment Netanyahu wants. Grunis's own opinion concedes the recruitment did not breach integrity, which is the threshold her petition would need to clear. Barnea's read carries weight on Gofman's fitness for Mossad. But it does not convert the claim past the legal threshold.

☒ **Dossier: The Unfinished State** — The AG petitioning Bagatz to override the same committee she defends as the floor of civil-service professionalism is the unfinished-state pattern at the personnel layer — the constitutional gap that lets the legal-guild instrument route around the elected coalition's appointment authority is the structural claim that brief develops.

BENNETT RUNS THE LIKUD STRONGHOLDS FIVE MONTHS OUT

Bennett launched a new campaign yesterday keyed to Likud strongholds, the first public move that names the opposition's strategic problem as a takeover bid for Netanyahu's base. The pre-election field is sorting itself the way we've tracked: Smotrich naming Ra'am the disqualifier, Yair Golan demanding that Bennett, Lapid, and Eisenkot publicly declare Abbas a legitimate partner, Eisenkot launching Yashar! with Yoram Cohen alongside, Liberman ruling Netanyahu out of any next government, Maariv readers polling Likud below 20 seats without Netanyahu. Netanyahu has signaled he leans toward moving the vote from October 27 to September 1.

ASSESSMENT

Bennett's bet is that the opposition-coalition split breaks on Likud voters. Smotrich's Ra'am-disqualifier framing was the coalition's pre-emptive answer to exactly this move. Bennett's campaign tests whether Likud's base reads "we will not sit with Abbas" as Netanyahu-only language or as Likud language. If Netanyahu pulls the vote forward to September 1, he is running on the same theory in reverse: Bennett's runway shortens faster than his name recognition compounds.

Israel and the World

KALLAS CLOSES ON THE "VIOLENT SETTLERS" SANCTIONS PACKAGE

Kaja Kallas told reporters in Brussels that the EU is "close to a deal" on the long-deferred sanctions package targeting Israelis the Council labels "violent settlers," with political agreement expected within days. The instrument lists named individuals and a handful of associations operating in Judea and Samaria, freezes their EU-jurisdiction assets, and bars entry to the Schengen area. Hungary continues to hold the architecture short of the required unanimity, and several southern states are signalling reservations on the listing methodology. Kallas framed the move as a Council priority "regardless of the Iran track."

ASSESSMENT

The package has been in deliberation for the better part of two years and has spent that time looking for the political moment to land. Kallas naming it as a Council priority "regardless of Iran" is the giveaway — the lawfare instrument runs on its own clock, parallel to whatever Brussels is publicly doing on the war [the moderate channel does not exist, and never did]. The listing methodology is the operational tell: "violent settlers" arrives in Brussels prelaunched through B'Tselem, Yesh Din, and the OHCHR rapporteur pipeline, which means the Council is sanctioning Israelis on the strength of NGO files it never audits. Hungary holding the line is doing the work the rest of the Council declines to do, which is reading the source material before voting on it.

HERZOG CLOSES A LATIN AMERICAN TOUR THAT READS AS ISAAC ACCORDS WORKING

President Herzog wrapped a state visit to Panama and Costa Rica, the second leg of a Latin American arc following Milei's Argentina anchor. Both governments reaffirmed embassy postures, expanded counter-terror and intelligence cooperation, and signed bilateral packages on water and agri-tech. Costa Rican President Chaves named Hamas and Hezbollah by name in joint

remarks — the kind of clarity Western European heads of state have spent two years declining to produce. Herzog's office signalled Honduras and Paraguay are next on the schedule.

ASSESSMENT

The conviction-based normalization arc is moving. Latin America is doing what the Council in Brussels and the bureaucracies in Madrid and Dublin will not — naming the actors, hosting the president, signing the cooperation memoranda. The substantive work is unglamorous: water, agriculture, counter-terror intelligence, the operational layer that compounds because nobody is staging a press event around it. Chaves naming Hamas and Hezbollah from the joint podium is the language Macron and Sanchez have outsourced [at some point can we drop the polite fiction that “evenhandedness” is anything other than a vocabulary problem?]. The arc Milei opened compounds into a working southern-hemisphere bloc whose floor is conviction rather than aid-conditional posture.

FOXMAN Z”L DIES AS THE PATTERN HE NAMED COMES DUE

Abraham Foxman z”l, 86, longtime national director of the Anti-Defamation League and a Holocaust survivor hidden as a child by his family's Polish-Catholic nanny, died yesterday. Foxman led the ADL from 1987 to 2015, building the organization's modern monitoring and legal-pressure architecture and naming the post-Cold-War return of organized antisemitism years before the institutional Jewish world was prepared to see it. The death lands in a week that has included UK police charging two men over antisemitic TikTok productions, charges in the Toronto-area synagogue shootings, and a thousands-strong London march against the wave of attacks the Met has spent eighteen months managing as public order.

ASSESSMENT

Foxman z”l spent a career arguing that antizionism was antisemitism in a register the institutional Jewish world found uncomfortable until the evidence stopped permitting the comfort. The architecture he built is being tested today against a threat environment he named in the 1990s and the federations spent the 2000s discounting — Iranian network operations routed through campus and TikTok, synagogue shootings working through Toronto and Manchester and Sydney as a pattern rather than as incidents. The harder reading is that the institutional consensus Foxman z”l was fighting to move has lost two decades it could have spent treating Iranian proxy ops as the state-sponsored network they always were.

Reader Mailbag

A READER ASKS WHETHER WE ARE LOSING THE IRAN WAR

A reader writes to ask whether Israel and the United States are losing the Iran war. The premise underneath: American bases have been “attacked and disabled,” and confidence in U.S. defense of allies has diminished. Worth taking on — the picture is inverted, and the inversion is doing work downstream of Tehran's framing.

U.S. destroyers transited the Strait of Hormuz under IRGC fire over the past seventy-two hours — missiles, drones, and small boats. No American asset was struck. CENTCOM answered with self-defense strikes on Bandar Abbas,

Minab, and Qeshm, and F/A-18 cannon fire disabled three Iranian-flagged tankers. The IRGC threatened direct strikes on American bases across the region during the same window — the verbal lever a regime reaches for once the physical one has broken. The exchange ran one way.

Riyadh and Kuwait — both of whom had withheld airbase access during prior cycles — reversed inside the same week and reopened it. That is the move allies make when they expect the protector to be standing through the next exchange [it is not the move they make when they are quietly hedging toward Tehran].

Losing would look like a regime holding the Strait at its preferred price, the framework window collapsing on Tehran's terms, and Gulf states drifting toward formal neutrality. None of that is happening. The framework window is still open into this week. Tankers are turning back. The Witkoff memorandum sits in front of a regime that cannot accept it and cannot reject it. That is a regime out of moves.

Briefly Noted

FRONTLINE & SECURITY

- **Jerusalem Post:** An IAF helicopter evacuating three wounded soldiers near the Lebanon border malfunctioned mid-mission; a second aircraft completed the evac.
- **JNS:** The Knesset extended the IDF's authority to call up reservists through May 31, with Chief of Staff Eyal Zamir telling MKs the army has “met all war goals set by the political echelon, and even beyond” — the extension is the operative move; the Zamir line is the political-cover sentence attached to it.

DIPLOMACY & GEOPOLITICS

- **JNS:** Israel formally advanced its entry into the Mediterranean fisheries management organization — the kind of routine multilateral docking that quietly outlives the boycott cycle.
- **JNS:** Netanyahu publicly pledged Israel “will not abandon” Syria's Druze, framing them as “brothers” alongside Jews and Circassians.

PUBLIC DIPLOMACY & MEDIA

- **Algemeiner:** UK police charged two men with religiously aggravated harassment over antisemitic TikTok videos filmed in a Jewish area of north London — a rare instance of British enforcement.
- **JTA:** Brussels Cathedral installed plaques apologizing for the medieval antisemitic imagery in its stained glass; the gesture is small, the precedent is what travels.

DOMESTIC & LAW

- **Israel National News:** Coalition ministers and MKs pressed police to open the Temple Mount to Jewish visitors on Jerusalem Day, framing access as a sovereignty test; the annual ritual, but the political weight behind the demand has hardened since October 7.

ECONOMY, TECH & INFRASTRUCTURE

- **Globes:** Israel's twelve-month fiscal deficit fell to 3.8% of GDP through April, the lowest since late 2023 — the war-spending arc is bending, which is the macro number to watch when the next defense-budget fight reaches cabinet.
- **Jerusalem Post:** WhatsApp co-founder Jan Koum donated \$200 million to Shaare Zedek Medical Center, the largest single gift in Israeli healthcare; the hospital will rename and add a medical tower.
- **Jerusalem Post:** The IDF's 18x Elite Impact program reported 150 reservist- and veteran-founded startups and \$15 million raised — the reservist-to-founder pipeline is the part of the tech ecosystem the call-up extension is quietly taxing.

CULTURE, RELIGION & SOCIETY

- **JNS:** An eight-year-old hiker found a 1,700-year-old Roman statuette fragment in the Ramon Crater — the standing reminder that the country's archaeological floor is, as ever, closer than people think.
- **Israel National News:** Nursing student Dani Nechmad married Golani officer Alon Freibach at Kibbutz Nahal Oz — the first wedding held on the kibbutz since October 7, 2023.

Developments to Watch

NORTHERN FRONT (LEBANON / SYRIA)

- **Western Bekaa enters the strike map** — The IDF Arabic spokesman's nine-village evacuation pulled Klayaa and Mashghara into the order — the first western Bekaa names since the round opened.
- **FPV-operator targeting** — Israeli military sources put Hezbollah's FPV-operator pool at roughly one hundred and named the operators a Northern Command priority, with the Glovanyov drone in the same news cycle.

REGIONAL AXIS (IRAN, HOUTHIS, MILITIAS)

- **Iran-coordinated Hormuz traffic narrates the corridor** — Tasnim and Iranian outlets reported a second Iraqi-crude VLCC (AGOIS FANOURIOS I) transiting Hormuz through Iran's "designated route," following Sunday's similar passage. Khamenei's ten-point "Hormuz doctrine" and Tehran's environmental-fine framing convert kinetic facts into administrative ones — every cleared transit Iran logs as routing is leverage Tehran can wave at any framework before Witkoff's deadline rewrites the corridor's actual command authority.
- **IRGC threatens French and British warships entering Hormuz** — An IRGC deputy foreign minister named "a decisive and immediate response" against any French or British naval entry into the strait, with Iranian outlets relaying Macron's clarification that France's prospective Hormuz mission was "coordinated with Iran."

HOME FRONT & POLITICS

- **Home Front Command guidelines hold through May 13** — The Home Front Command extended the current defensive posture in force through Wednesday, May 13, which carries the public-protection calendar past the Iranian response window and through the first half of Trump's Beijing State visit.
- **September 1 election-date decision compresses the opposition runway** — Netanyahu has signaled he leans toward moving the vote from October 27 to September 1, with the official decision pending. If the date moves inside the next week, Bennett's Likud-strongholds campaign loses eight weeks of name-recognition compound and Smotrich's Ra'am-disqualifier framing gets the shorter cycle it was built for.

Everyone in the picture is buying time except the people doing the kinetic work. Tehran is buying it on Hormuz. The Pakistani conduit is buying it past the regime's six-to-eight-week ceiling. The cabinet is buying it on Gaza beyond the Yellow Line. The Attorney General is buying it on Mossad. The IDF is the only actor in the field whose tempo is rising. Lebanon's strike map widens. Gaza's tunnel inventory shrinks. The operator pool inside Hezbollah's FPV tier works downward toward the ceiling Avivi already named. The framework will not save Iran's program. The conduit cannot bind the regime that wrote it. The line in southern Lebanon and the line east of the Yellow Line are the same line.

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

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