



Forensic intelligence for those who act.

READER EDITION

May 12, 2026

ISRAEL BRIEF

Tuesday, May 12

The Ohio-class transits Gibraltar, Brussels sanctions the towns alongside the Hamas leaders, and the IDF moves without waiting on either.

◇ URIEL ZEHAVI

THE BOTTOM LINE Wecht is a sitting state Supreme Court justice, married at Tree of Life, with eleven years on the bench as a Democrat, naming the party's tolerance of Jew-hatred as the reason he is leaving. That is the partisan-sort thesis arriving inside the judiciary, where we said it would arrive next, faster than the original window. [Wecht is naming what J Street's floor inside the primary process already implies for any Democratic nominee who cannot disavow it.] Hochul's move is the same realignment running the other direction — an incumbent Democratic governor opting into a Trump school-choice program and pushing synagogue buffer zones to lock down an Orthodox bloc her sixteen-point statewide lead does not own. Both responding to the same fact on the ground — the Jewish-political-class fracture is no longer prospective. Judge Paul's Santa Clara ruling names where the legal guild is now. The Jewish prosecutor's identity-naming becomes the prosecutable conduct, and "death to Israel" spray-painted on a wall does not. Jew-hate is not "rising," the public masking of it is just no longer required by so-called polite society. The partisan-capture window we sized at one to two cycles is compressing inside the first.

CLASSIFICATION

Reader Edition

DISTRIBUTION

Open · Free to share with attribution

IN THIS EDITION

Israel Brief: Tuesday, May 12	4
Flash Brief	4
The War Today	4
USS Georgia Through Gibraltar as Trump Puts the Ceasefire at 1% . .	5
Hezbollah's Hermes 450 Shot and the Litani Raid That Surfaced With It	5
Lavan Island, Pakistan's Tarmac Slots, and the Mediator Question . .	6
Inside Israel	6
The Court Hears the Petition the Committee Already Resolved	6
The Summer Session Opens 93-0 on the Nukhba Tribunal	7
Smotrich Asks the Cabinet to Vote on Sovereignty as Sa-Nur Reestablishes	7
Israel and the World	8
Brussels Names Its Equivalence	8
Washington and London Move on the Iranian Procurement Network .	9
The Times Runs a Kristof Blood Libel and Calls It a Column	10
Eurovision Opens in Vienna with the NYT Investigation Already in the Room	10
A Pennsylvania Justice Leaves the Party, a New York Governor Buys Yeshivas, and Jew-hate is Still "Rising"	11
Briefly Noted	12
Frontline & Security	12
Diplomacy & Geopolitics	12
Domestic & Law	12
Economy, Tech & Infrastructure	12
Culture, Religion & Society	12
Developments to Watch	13
Judea & Samaria	13
Northern Front (Lebanon / Syria)	13

Gaza & Southern Theater	13
Regional Axis (Iran, Houthis, Militias)	13
Diplomatic & Legal	14
Home Front & Politics	14

Israel Brief: Tuesday, May 12

SHALOM, friends.

The framework window closed yesterday without an organized regime answer, and Trump put the ceasefire at one percent. The Ohio-class USS Georgia transited Gibraltar — a movement the Navy almost never publicly admits or discloses. Brussels paired four Israeli organizations with ten Hamas leaders in one sanctions package, with Magyar's veto-lift unlocking the bloc. Bagatz heard Baharav-Miara's filing against Netanyahu's Mossad pick — her fourth confrontation against the coalition in a single week.

FLASH BRIEF

- **Iran framework — Trump 1% / Tehran 90%:** Trump calls Tehran's response garbage and puts the ceasefire at 1%. Iran's parliament threatens to enrich to weapons grade if struck again. *See The War Today.*
- **USS Georgia through Gibraltar:** The Ohio-class SSGN entered the Mediterranean Sunday — a transit the Navy almost never publicly discloses. *See The War Today.*
- **Hermes 450 SAM threshold:** Hezbollah fired a surface-to-air missile at an IAF Hermes 450 over southern Lebanon, the first SAM attempt against an Israeli aircraft since Roaring Lion. *See The War Today.*
- **Golani's Litani raid surfaces:** A week-long IDF raid ten kilometers inside the Litani sector dismantled the staging ground Hezbollah had built for the day-of-command northern assault. *See The War Today.*
- **Pakistan's tarmac slots:** CBS confirms Pakistan hosted Iranian military aircraft during the U.S. campaign while presenting as neutral mediator. *See The War Today.*
- **EU sanctions Israeli organizations alongside Hamas leaders:** Brussels lists Regavim, HaShomer Yosh, Amana, and Nachala in the same package as ten Hamas leaders. Magyar lifts Orban's veto. *See Israel and the World.*
- **Smotrich moves on Area C as Sa-Nur reestablishes:** Smotrich asks the cabinet to vote on transferring Areas A and B terrain to Area C. The first 126 of 643 authorized units are up at Sa-Nur — Sharon's 2005 evacuation reversed twenty-one years on. *See Inside Israel.*
- **AG petition heard, AG opens a fourth front:** The High Court heard Baharav-Miara's filing against Netanyahu's Mossad pick this week. The same office moved on Levin, the AG-split bill, and a Qatargate softening in the same seven days. *See Inside Israel.*
- **Knesset 93-0 on Nukhba tribunal:** Public death-penalty trials for October 7 perpetrators authorized. The reservist envelope extends through May 31. *See Inside Israel.*
- **Kristof in NYT opinion section:** Kristof concedes no evidence supports the central rape allegation and runs it anyway. *See Israel and the World.*

The War Today

USS GEORGIA THROUGH GIBRALTAR AS TRUMP PUTS THE CEASEFIRE AT 1%

The Ohio-class SSGN USS Georgia transited Gibraltar on May 10 and entered the Mediterranean. The Navy almost never publicly discloses such movements. The Georgia carries Tomahawks and the lift profile for special-operations insertion, and it arrived as Trump put the ceasefire at “approximately a one percent chance of living” and called Tehran’s response to the fourteen-point framework “a piece of garbage.” Treasury sanctioned the China-linked tier of Iranian oil trade. FinCEN issued an IRGC sanctions-evasion alert to U.S. banks the same afternoon. Iran’s parliamentary security committee answered the framework’s enrichment freeze with a warning that Tehran will enrich to ninety percent — weapons grade — if struck again. The forty-eight-hour response window has now closed without an organized regime answer. Project Freedom stays suspended. The blockade stays in place. Trump flies to Beijing on Thursday and intends to ask Xi to lean on Tehran.

ASSESSMENT

The channel to Mojtaba Khamenei has held the regime’s seat at the table for two months while deciding nothing [which is itself a decision]. The submarine through Gibraltar is the kinetic vocabulary of “life support” [the bedside visitor whose other job is to conduct the autopsy]. The probability of conventional escalation inside the SNSC’s six-to-eight-week ceiling holds and tilts upward on the Xi handoff. If Beijing cannot deliver Tehran inside the visit, the predicate for restraint disappears.

HEZBOLLAH’S HERMES 450 SHOT AND THE LITANI RAID THAT SURFACED WITH IT

Hezbollah fired a surface-to-air missile at an IAF Hermes 450 over southern Lebanon yesterday — the first SAM attempt against an Israeli aircraft since Roaring Lion. The interceptor launch triggered sirens at Neve Yam on the Carmel coast, the southernmost community alerted since the ceasefire was declared. Military officials confirmed that a Hezbollah drone struck an Iron Dome battery. The IDF issued fresh evacuation orders for Arzoun, Tayr Debba, Al-Bazouriyah, and Al-Hawsh, and thousands are reportedly moving toward Beirut and the north. The Golani brigade conducted a week-long raid ten kilometers inside the Litani sector — terrain Hezbollah was preparing as the jumping-off line for the day-of-command northern assault. Three days of close-quarters combat. Fifteen Hezbollah operatives eliminated. Two Golani fighters lightly wounded.

ASSESSMENT

The SAM at the Hermes 450 is a new rung — Qassem reaching for what he held in reserve while the drone arc was still bleeding the IDF without forcing a pause. The Golani raid revealed today is what closing on the deep-Litani staging ground looks like in the field. The Defense Ministry’s FPV-countermeasure solicitation, two years late, will not buy the gap down for six months even with emergency procurement.

LAVAN ISLAND, PAKISTAN'S TARMAC SLOTS, AND THE MEDIATOR QUESTION

The Wall Street Journal reported the UAE secretly struck Iran in early April, hitting the refinery on Lavan Island in the middle of the Gulf and shutting it for months. Abu Dhabi denies the strike. Iran's reply was the more than 2,800 missiles and drones that hit the Emirates over the war's course. CBS reported that Pakistan — the "neutral mediator" Trump's team has been routing the framework through — quietly hosted Iranian military aircraft on its airbases during the U.S. campaign, sheltering Iranian assets from American strikes. Iran also moved civilian aircraft to Afghanistan. The U.S. side cannot confirm whether the Afghan-routed planes included military airframes.

ASSESSMENT

The "neutral mediator" was running an Iranian alert hangar. Pakistani mediators told Reuters they expect to "close this very soon," and what they appear to have already closed is the southbound route for Iran's surviving air assets [the kind of mediator whose neutrality is measured in tarmac slots]. Lavan Island puts a UAE strike on the record at the same moment Riyadh is publicly distancing from "an Israeli plan to plunge the region into ruin." Two postures, because two postures is what each Gulf state's domestic constituency requires.

Inside Israel

THE COURT HEARS THE PETITION THE COMMITTEE ALREADY RESOLVED

The High Court today heard Uri Almakias's petition — filed by Attorney General Baharav-Miara — to disqualify Netanyahu's pick of Maj. Gen. Roman Gofman as Mossad chief, two weeks before Gofman's June 2 swearing-in. The petition rests on Gofman's alleged role running Almakias as an influence-operation source. Haliva's MAHBAM commander told the Grunis appointments committee that Gofman's involvement was "minor." Brig. Gen. Baram, in an official letter, contradicted outgoing chief David Barnea's letter to the AG which called Gofman "dangerous and not meeting the integrity standard." The Grunis members concluded the affair was "a failure, not an integrity flaw." Baharav-Miara filed against the appointment anyway. The same AG office filed a separate position urging Bagatz to compel Justice Minister Levin to coordinate with Supreme Court President Yitzhak Amit on judicial appointments. The Knesset Constitution Committee advanced the bill splitting the AG portfolio between civil legal counsel and state prosecutor. MAHASH is reportedly softening its Qatargate posture from state-security charges toward integrity-only — the same week Yaakovi's defense produced its central-witness misconduct evidence.

ASSESSMENT

Baharav-Miara has opened four confrontations against the coalition inside a single week — Gofman, Levin, the AG-split bill, and the Qatargate softening. The Gofman petition is the cleanest illustration of the office's reach beyond its remit. The Grunis appointments committee — whose purpose is to flag integrity flaws in senior appointments — found no integrity flaw. The MAHBAM commander whose unit was actually involved called the underlying charge minor. The AG filed anyway, on grounds the committee that they were supposed to draw the line they had already declined to draw. The Prime Minister appoints the Mossad chief. Baharav-Miara has decided that he can appoint a Mossad chief she will permit [a power the office of the Attorney General does not hold]. The Levin filing is the same overreach in a different portfolio — an unelected legal officer asking the Court to compel an elected minister to coordinate appointments with the Court's own president. [Baharav-Miara has decided she is the cabinet she lost the election to be in.] The Knesset Constitution Committee's AG-split bill is the constitutional answer to a position the AG built without constitutional warrant. Whether Bagatz hears this petition on the merits or declines as outside its jurisdiction is the test of whether the Court is participating in the same expansion or marking its limit. [Two guesses which.] Sohlberg's June 1 enforcement deadline lands the day before Gofman's June 2 swearing-in. The Knesset's bill is the coalition's answer at the same window.

THE SUMMER SESSION OPENS 93-0 ON THE NUKHBA TRIBUNAL

The Knesset returned from spring recess Sunday and passed the Nukhba-prosecution law 93-0 in second and third reading. The bill establishes a special tribunal in Jerusalem to try the October 7 perpetrators in public proceedings, with the death penalty authorized for terrorism resulting in murder. The session's legislative blitz also carries the haredi draft-exemption bill, the AG-role-split bill, and the broadcast reform package. The Knesset extended cabinet authority to call up reservists through May 31 — the envelope authorizing up to 400,000 reservists. IDF Chief of Staff Lt. Gen. Eyal Zamir told the Foreign Affairs and Defense Committee the IDF had met “all war goals set by the political echelon, and even beyond.” Coalition operatives are preparing the procedural sequence to move elections from October 27 to September 1.

ASSESSMENT

A 93-0 roll call is the rare moment when the chamber's math says what the chamber's politics usually obscure. Public death-penalty trials in Jerusalem for the perpetrators of October 7 is one of the few propositions that compresses the divide. The reservist extension makes the picture concrete — the war's manpower envelope keeps getting renewed because the cabinet cannot present a finish on terms it can sell.

SMOTRICH ASKS THE CABINET TO VOTE ON SOVEREIGNTY AS SA-NUR REESTABLISHES

In response to the EU's sanctions package against Israeli organizations in Judea and Samaria, Smotrich called on Netanyahu to convene the cabinet and authorize transferring areas from Areas A and B to Area C. “They will not impose this on us.” Sa’ar called the comparison of sanctioned Israelis to Hamas operatives “morally distorted” and reiterated that sovereignty is not on the table “in the coming months.” Daniella Weiss of Nachala: “We are not waiting for permission from Brussels or anyone else. The only compass that matters is the national interest of Am Yisrael in Eretz Yisrael.” Sa-Nur — one

of the four Northern Samaria communities Sharon uprooted in 2005 — now has the first 126 of Smotrich's authorized 643 units up. Residents called it “a historic correction.” The shepherds project, dismissed for years by foreign press as a fringe initiative of young Israelis on isolated hilltops, now runs more than 120 farms across Judea and Samaria and sits inside Netanyahu's stated security strategy of preventing “the next October 7.” Smotrich separately disclosed that Netanyahu reversed his own instruction to minimize aid trucks into Gaza after Smotrich demanded the cut two weeks ago.

ASSESSMENT

The split is still the strategy. Sa'ar continues to hold the diplomatic line in Berlin and Washington while Smotrich rebuilds the buildings and authorizes the farms. Sa-Nur is the proof of concept — a 2005 evacuation reversed twenty-one years later, with 126 units regularized in the same news cycle Brussels is sanctioning the framework that authorized them. The more important story is the shepherds. A project the foreign press has spent five years framing as fringe extremism has been absorbed as cabinet-level security policy against the next October 7, with 120 farms across the territory [which is what the foreign press was actually objecting to]. The aid-truck reversal is the smaller piece of the same picture — Netanyahu walks a Smotrich demand back in cabinet, reverses it in private, and Smotrich goes to the press. Whichever government takes office in September or October, the buildings are up and the farms are running.

Israel and the World

BRUSSELS NAMES ITS EQUIVALENCE

The EU's twenty-seven foreign ministers reached political agreement in Brussels yesterday on sanctions against four Israeli organizations and three Israelis in Judea and Samaria. Regavim and its director Meir Deutsch, HaShomer YOSH and its former chief Avichai Suissa, the Amana development cooperative, and Nachala under Daniella Weiss landed on the list, paired in the same package with sanctions on ten Hamas leaders. Hungary's Magyar lifted Orbán's veto in his first foreign-policy act. Kallas, Barrot, and Prévot moved the package through the same afternoon. The list still needs the legal-technical step before assets freeze and entry bans take effect. Sa'ar called the implied equivalence between Israeli civilians and Hamas operatives “morally distorted.” Netanyahu's office accused the bloc of “moral bankruptcy” while Israel and the United States do Europe's “dirty work” in the Iran campaign. Smotrich placed a plan on Netanyahu's desk to transfer strategic terrain in Areas A and B to Area C and asked the cabinet to approve it.

ASSESSMENT

What Brussels sanctioned in this package is the Israeli decision to live in Judea and Samaria. Regavim files planning petitions. HaShomer Yosh runs volunteer security for farming communities. Amana and Nachala build towns the Israeli state itself authorizes and funds. None of them is a militia. None has been credibly tied to organized violence. The “violent settlers” pretext was always a placeholder for the actual offense — Jewish presence on Jewish land. Brussels has now placed that presence on the same sanctions list as the political leadership of the October 7 massacre. The bloc that cannot tell a planning lawyer from a Khan Yunis Brigade commander has named its equivalence on the record. Brussels is now officially of the view that Jews building houses on Jewish land are morally indistinguishable from the architects of the rape and murder of 1,200 Jews. [Which is the position the Khan-warrant track and the suspension push have been working toward for two years. Brussels just ratified it for them.] The substantive damage is that the state itself funds most of these organizations, which means European-linked Israeli banks now cannot service the Israeli government’s own grantees — sovereign-choice pressure on Israel routed through Israeli financial plumbing because Brussels has decided that Jewish presence in Eretz Yisrael is the offense it will sanction. Magyar’s reversal is now the working baseline for the next wave of Brussels lawfare.

✠ Dossier: Judea’s Settlers — *The narrative-warfare lineage from UN Resolution 2334 the Dossier traces is the structural claim the EU listing now operationalizes — pairing Regavim, HaShomer Yosh, Amana, and Nachala with Hamas leaders in the same instrument routes the lawfare pressure through European-linked banks that service the Israeli government’s own grantees.*

WASHINGTON AND LONDON MOVE ON THE IRANIAN PROCUREMENT NETWORK

The State Department sanctioned three Chinese geospatial firms — MizarVision in Hangzhou, The Earth Eye in Beijing, and Chang Guang Satellite Technology — for supplying satellite imagery of US and partner military facilities to Iran during Operation Epic Fury. Chang Guang was previously listed for feeding the same product to the Houthis. Treasury added ten individuals and entities across China, Iran, Belarus, and the UAE for procuring weapons and raw materials for Iran’s drone and ballistic-missile programs, and listed MINDEX, the export arm of Iran’s defense ministry. London the same week sanctioned roughly a dozen people and entities the Foreign Office named as criminal proxies of Iran involved in attack plots and finance operations on British soil, treating the network through the National Security Act framework the IRGC-proscription debate has been waiting on.

ASSESSMENT

The Chinese geospatial firms are the targeting cell behind the drone and missile salvos that killed Americans and Emiratis during Epic Fury. The State Department naming them is the first time Washington has put a price on the Beijing-Tehran intelligence pipeline. Treating Iran’s British operatives as a foreign-intelligence problem is the procedural move Starmer needs to keep advancing on IRGC proscription in the next parliamentary session without losing the months already spent building the criminal-proxies list. The package only works if the financial and visa enforcement actually bites — an entity-listing nobody acts on is a press release. The probability we logged at “high” on UK proscription in the next parliamentary session holds. The Foreign Office is moving on the substance without waiting for the label.

THE TIMES RUNS A KRISTOF BLOOD LIBEL AND CALLS IT A COLUMN

The New York Times opinion section ran a Nicholas Kristof piece yesterday alleging that Israel uses sexual violence — including the vile conspiracy theory that prison guards train dogs to rape Palestinian detainees — as part of its “security apparatus.” Kristof concedes in the same column that “there is no evidence that Israeli leaders order rapes” and rests the rest on conversations with fourteen people who “said they had been sexually assaulted by Israeli settlers or members of the security forces,” plus UN and Euro-Med Human Rights Monitor sourcing. Euro-Med is Ramy Abdu’s outfit, whose Hamas-front lineage NGO Monitor and Eitan Fischberger have spent years documenting. Deborah Lipstadt, Gerald Steinberg, Jacqueline Carroll, and Nadav Pollak of Reichman all hit the column the same day. Pollak named it a blood libel. Lipstadt asked whether the Times has any sense of decency left [spoiler: no, they don’t].

ASSESSMENT

Kristof acknowledged no evidence supports his central allegation, then ran the allegation anyway — and the Times opinion desk ran him. The pipeline is the news. Euro-Med (a Hamas front) launders the claim into UN-style citation. Kristof launders the UN-style citation into Times-prestige real estate. The Times-prestige real estate launders it into the campus-and-cabinet bibliography for the next twenty years. [The fact-checking standard for a sexual-violence allegation against an entire state is apparently lower than the Times applies to a movie review. But, no, of course it couldn’t possibly just be Jew-hate.] The standing characterization of the NYT Middle East desk — reliably more sympathetic to the actors targeting Israel than to the state being targeted — now gets an op-eds too.

EUROVISION OPENS IN VIENNA WITH THE NYT INVESTIGATION ALREADY IN THE ROOM

The 70th Eurovision opens in Vienna tonight with Israel’s Noam Bettan performing “Michelle” in the first semi-final, against the smallest contestant field since 2004. Five broadcasters — Spain, Ireland, Slovenia, the Netherlands, and Iceland — withdrew over Israel’s participation, and Spain, Ireland, and Slovenia will not air the contest at all. The New York Times yesterday published an investigation alleging Israel ran a roughly one-million-dollar coordinated campaign during the 2025 edition to push the audience vote toward Yuval Raphael, the Nova survivor whose ballad took the public vote in Basel — including digital media buys across European markets where the professional juries were scoring Israel low. Israel Hayom walked through the Spanish number specifically — 33.34% of the Spanish audience vote went to Israel in the 2025 grand final, 47,570 ballots, while Madrid’s public broadcaster RTVE was running its loudest boycott line. The EBU has pulled forward a reform package — votes per fan capped at ten not twenty, juries reinstated for the semi-finals, third-party promotional campaigns banned — and warned KAN on Friday over a Bettan ad that called on viewers to “vote ten times for Israel.” Activists plan to set up coffins in central Vienna tomorrow night.

ASSESSMENT

The boycott bloc could not deliver a direct EBU vote to bar Israel and lost the procedural fight in December, so the next move is to relitigate Basel as the legitimacy problem and let the institutional reform package land as the consolation. The interesting tell is the gap the NYT investigation itself documents — RTVE running the boycott line on one frequency while the Spanish television audience handed Israel its top score on another. The voting “machine” the Times piece names is the European public refusing to follow its own broadcasters. The EBU’s response — cap the votes, reinstate the juries, ban the campaigns — solves for the audience, not for the boycotters.

A PENNSYLVANIA JUSTICE LEAVES THE PARTY, A NEW YORK GOVERNOR BUYS YESHIVAS, AND JEW-HATE IS STILL “RISING”

Justice David Wecht left the Pennsylvania Democratic Party Monday, citing rising antisemitism, and registered unaffiliated. Wecht — elected as a Democrat in 2015, formerly vice-chair of the state Democratic Party, married at Pittsburgh’s Tree of Life Congregation — wrote that “acquiescence to Jew-hatred is now disturbingly common among activists, leaders and even many elected officials in the Democratic Party.” He named “Nazi tattoos, jihadist chants, intimidation and attacks at synagogues, and other hateful anti-Jewish invective” as the pattern the party is “minimizing, ignoring, and even coddling.” The same day, New York Gov. Kathy Hochul announced New York will opt into the federal Education Freedom Tax Credit, the \$1,700-per-donor school-choice program — in effect, funding scholarships for yeshivas — and is moving synagogue buffer-zone legislation. A Siena poll has her leading Republican Bruce Blakeman 49-33 statewide but 46-41 among Jewish voters. A Santa Clara County judge ordered Jewish DA Jeff Rosen to recuse himself from the Stanford “death to Israel” vandalism case. Defense attorneys had argued his calling the vandalism antisemitic in campaign material was a conflict. The case moves to the California Attorney General’s office. Trump ambassador-to-Iceland nominee Billy Long shared a Nick Fuentes clip on X Sunday. Reform UK councillor Jay Cooper resigned the whip after his “Holocaust is a hoax” social-media history surfaced post-election.

ASSESSMENT

Wecht is a sitting state Supreme Court justice, married at Tree of Life, with eleven years on the bench as a Democrat, naming the party’s tolerance of Jew-hatred as the reason he is leaving. That is the partisan-sort thesis arriving inside the judiciary, where we said it would arrive next, faster than the original window. [Wecht is naming what J Street’s floor inside the primary process already implies for any Democratic nominee who cannot disavow it.] Hochul’s move is the same realignment running the other direction — an incumbent Democratic governor opting into a Trump school-choice program and pushing synagogue buffer zones to lock down an Orthodox bloc her sixteen-point statewide lead does not own. Both responding to the same fact on the ground — the Jewish-political-class fracture is no longer prospective. Judge Paul’s Santa Clara ruling names where the legal guild is now. The Jewish prosecutor’s identity-naming becomes the prosecutable conduct, and “death to Israel” spray-painted on a wall does not. Jew-hate is not “rising,” the public masking of it is just no longer required by so-called polite society. The partisan-capture window we sized at one to two cycles is compressing inside the first.

Briefly Noted

FRONTLINE & SECURITY

- **Jerusalem Post:** Army Radio reports the IDF is standing up an in-house FPV drone factory staffed by 200 haredi soldiers, targeting thousands of units in two months and tens of thousands monthly thereafter.

DIPLOMACY & GEOPOLITICS

- **Jewish Insider:** Nebraska's NE-2 Democratic primary today tests the J Street bench. Cavanaugh, who refused to sign the October 7 anniversary resolution backing Israel, faces the more pro-Israel Powell.
- **Israel Hayom:** Mahmoud Abbas is stacking the Fatah Central Committee for Friday's vote with intel chief Majed Faraj, his son Yasser Abbas, and Ramallah governor Laila Ghannam. Pushed out — Abbas Zaki, Jibril Rajoub, and Tawfiq Tirawi, each of whom broke with him.

DOMESTIC & LAW

- **Israel Hayom:** The Tel Aviv District Court released the IAF reserve major accused in the Polymarket case to electronic-monitored house arrest. The defense line the judge declined to credit — “the whole air force gambles.”
- **Walla:** Lahav 433 raided fourteen northern money-changers on terror-financing and laundering charges spanning hundreds of millions of shekels. The seizure — eight million in gold, two million in cash, seven properties, twenty-two million frozen in accounts.

ECONOMY, TECH & INFRASTRUCTURE

- **Jerusalem Post:** Cellular Intelligence took global rights to Novo Nordisk's Phase 1/2 stem-cell Parkinson's program, with the Danish giant taking equity in the Israeli AI-biotech and offloading a Fast-Track-designated trial it had scaled back in its own October restructuring.
- **Globes:** Frame Security closed a \$50 million round led by Index, Team8, and Picture, with Wiz CEO Assaf Rappaport and Elad Gil writing into another Unit 8200-founded cyber shop — this one selling defense against the deepfake-and-social-engineering vector the rest of the stack cannot reach.
- **Israel Hayom:** Morgan Stanley joined the Finance Ministry's primary-dealer program, expanding the foreign bench inside the closed twelve-institution club obligated to bid in every Israeli debt auction. Each new entrant pulls Israel's sovereign borrowing costs down.
- **JNS:** Microsoft handed its Israel branch to its France office during an internal review of Unit 8200's Azure use, and Microsoft Israel CEO Alon Haimovitz is out. Some Defense Ministry cloud workloads have already migrated to Amazon and Google — the Guardian's 8200 investigation has cost Israel one of its three hyperscalers.

CULTURE, RELIGION & SOCIETY

- **Israel Hayom:** Barcelona's Lamine Yamal raised a Palestinian flag from the stands at the club's La Liga title celebration.

Developments to Watch

JUDEA & SAMARIA

- **Fatah Central Committee vote Friday** — Abbas is moving to push Abbas Zaki, Jibril Rajoub, and Tawfiq Tirawi off the nineteen-member body in Friday's internal vote. Majed Faraj, Yasser Abbas, and Laila Ghannam fill the seats. The post-Abbas succession architecture the Council in Brussels reads as moderate closes around Faraj this week.
- **Yom Yerushalayim flag parade Thursday** — Thousands of officers deploy through the Old City for Thursday's parade, with coalition ministers pressing police to open the Temple Mount to Jewish visitors. Access is the cleanest base-mobilization signal Smotrich and Ben Gvir have left inside the pre-election sort.

NORTHERN FRONT (LEBANON / SYRIA)

- **Counter-drone "traffic light" rollout** — MAFAT is deploying the detection-kit tier to Lebanon-front units, named by Northern Command as the first response to the FPV-operator pool. Senior officers concede the cable-controlled tier remains a regular threat for at least six months — the kit moves first, the interceptors come second.
- **Hezbollah surface-to-air threshold crossed** — Hezbollah fired a SAM at an IAF Hermes 450 over southern Lebanon yesterday, the first such attempt since Roaring Lion. If the SAM rung holds as what Qassem reaches for when the drone arc bleeds without forcing a pause, the next IAF cycle has to budget for it. **LIKELY TO ESCALATE**

GAZA & SOUTHERN THEATER

- **Nahal Oz force-reduction backlash** — Kibbutz management told residents the IDF is reducing the force level inside Nahal Oz "in the coming days." The 24-72h question is whether Southern Command revises before the reservist-extension renewal hits cabinet May 31, or whether the Western Negev community most identified with October 7 publicly walks the return back.
- **Hamas rearmament during the Iran attention shift** — IDF and Shin Bet pulled down a joint PIJ-Hamas weapons-production site in northern Gaza this morning, with intelligence assessing Hamas is aspiring to the FPV tier inside the diplomatic window. Every additional week the deferred cabinet vote runs, the rebuild compounds against the Yellow Line.

REGIONAL AXIS (IRAN, HOUTHIS, MILITIAS)

- **Trump-Xi Beijing summit Thursday** — Trump flies to Beijing Thursday to ask Xi to lean on Tehran, with the framework window already closed and the Ohio-class through Gibraltar. If Beijing cannot deliver Tehran inside the visit, Trump's "two weeks more" returns as an operational instrument. **LIKELY TO ESCALATE**
- **Quds chief Kaani in Baghdad as cabinet runway closes** — Kaani is in Baghdad pressing the Coordination Framework on the next government, with the al-Zaidi runway roughly half-consumed and Treasury's \$10 million al-Kabi bounty already pre-positioned. The 24-72h variable is whether al-Zaidi

names a cabinet that survives both Treasury pressure and the Quds veto, or whether the formation collapses into the IRGC's preferred drift.

DIPLOMATIC & LEGAL

- **Senate Republicans split on resuming Iran operations** — The Senate GOP is publicly split on backing resumed kinetic operations if the framework collapses, with the divide running between the Graham wing and the restraint caucus. The variable is whether the chamber's working majority on Iran enforcement holds through the Beijing handoff.

HOME FRONT & POLITICS

- **Deri seeks draft-bill delay past elections as Lando holds** — Deri is pressing to push the haredi conscription law past the election date while Rabbi Lando is still deciding whether Degel HaTorah advances the coalition's bill. Sohlberg's June 1 enforcement deadline lands the day before Gofman's swearing-in. If the bill slips past September 1, the next government inherits the regime the High Court already ruled the executive cannot continue ignoring.
- **Druze Golan riot inside the police line** — Rioters burned equipment and wounded workers at the national wind-turbine project in the Golan with police present and unable to restore order. The Druze-front governance picture the Sweida and Hader cycles already strained now runs the same arithmetic inside the green line.

The framework would have frozen Lebanon and preserved Iran's program inside a managed corridor. Its closure exposes how many actors had already priced its failure. Trump flies to Beijing on Thursday to ask Xi for the restraint the framework was supposed to deliver. The Ohio-class is in the Mediterranean for the answer Beijing will not give.

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

ABOUT THE AUTHOR

Uriel Zehavi

EXECUTIVE DIRECTOR · MITZPE INSTITUTE

Uriel Zehavi is the executive director of Mitzpe Institute, where he writes the daily Israel Brief and co-directs its Institutional Intelligence practice with Modi Zehavi. He is the author of four books from Mitzpe Press and advises Israeli and allied clients on strategic communications for Western audiences.



ABOUT MITZPE INSTITUTE

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.

PASSED ALONG TO YOU?

The daily Israel Brief is free at mitzpe.org. The operational layer — Closed Dossiers, Vantage, and Watchwords — is members-only. Become a member, gift a membership, or book a briefing at mitzpe.org.

Reader Edition · Free to share with attribution to Mitzpe Institute.