

iNSS
המכון למחקרי ביטחון לאומי
THE INSTITUTE FOR NATIONAL SECURITY STUDIES
אוניברסיטת תל אביב
UNIVERSITY

The Middle East at a Turning Point

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TEL AVIV UNIVERSITY

2025

Annual Report



Strategic Analysis in Times of Transformation

Since October 7, Israel and the broader Middle East have undergone profound change, creating both strategic opportunities and significant risks that will shape Israel's security environment for years to come. The regional map is being redrawn: the Shi'ite axis has fractured, Iran's influence has been curtailed, and new power brokers are emerging. At the same time, states aligned with the Muslim Brotherhood—particularly Qatar and Turkey—are expanding their regional footprint. Syria and Lebanon are entering a new phase of strategic reconfiguration, and the potential expansion of the Abraham Accords has reemerged as part of a broader transition.

Yet despite Israel's military achievements, none of these arenas can be considered stable. 2025 ended with some formal cessations of hostilities that were not translated into durable peace. Meanwhile, troubling trends are taking hold: erosion in Israel's international standing, growing diplomatic isolation, and a marked rise in global antisemitism. These dynamics are compounded by the increasing internationalization of the Israeli–Palestinian conflict, illustrated by the September 2025 United Nations General Assembly vote endorsing “tangible, time-bound, and irreversible steps” toward a two-state solution, as well as by deepening polarization within Israeli politics and civil society.

In this volatile environment, the Institute for National Security Studies (INSS) serves as a strategic compass—providing independent, research-based analysis and actionable policy recommendations to decision-makers and key stakeholders. The shifting balance of threats and opportunities requires continuous reassessment of Israel's national security strategy. INSS research programs are therefore structured to refine and update policy recommendations in real time, ensuring that leadership is equipped to capitalize on emerging opportunities while mitigating evolving risks.

Looking ahead, the scale and speed of regional transformation demand sustained investment in rigorous strategic research. In the coming year, INSS and its researchers will continue to operate with clarity of purpose: strengthening Israel's security and resilience through forward-looking analysis and policy innovation. With the partnership of our donors and strategic counterparts, the Institute will advance practical recommendations, address critical national security challenges, and contribute to shaping a more stable and strategically coherent regional order.



Credit: Yaron Brener

Our Vision and Drive for Impact

The Institute for National Security Studies (INSS) is an independent, nonpartisan, policy-oriented research institute dedicated to strengthening Israel's national security. Our mission is to safeguard Israel's sustainable future as the democratic nation-state of the Jewish people, reinforce its position as a regional power, and anchor its place within the community of liberal democracies.

Recognized as Israel's leading national security think tank and ranked among the world's top institutions in its field, INSS conducts rigorous, data-driven research that informs innovative and actionable policy recommendations. The Institute develops and promotes strategic frameworks that translate Israel's military and technological advantages into enduring geopolitical strength, grounded in robust regional and global partnerships and sustained by a strong, moral, and inclusive domestic society.

As a leading independent non-governmental policy institute, engaged in Israel's national security discourse, INSS continuously reassesses its analysis and recommendations considering evolving regional and global dynamics. Through its publications and public engagement, the Institute reaches decision-makers and strategic communities in Israel and abroad, contributing informed, forward-looking perspectives on the complex challenges shaping Israel's security environment.

Organizational Structure

To advance its overarching mission, INSS is organized around four primary research programs addressing the core arenas of Israel's national security, supported by a cross-arena program that integrates complementary disciplines.

National Security Policy

This program examines Israel's military strategy and internal security challenges, including IDF force-building policies and operational doctrine. It also analyzes domestic factors that shape national security, such as civil–military relations, economic constraints, and the resilience and cohesion of Israeli society.

From Conflict to Agreements

This program focuses on advancing regional diplomacy and strategic alliances between Israel and its Arab neighbors. It develops policy recommendations aimed at resolving the Israeli–Palestinian conflict and expanding the Abraham Accords, with the goal of strengthening Israel's regional integration and fostering durable partnerships.

Iran and the Shi'ite Axis

This program conducts comprehensive research on Iran's nuclear ambitions, military and ballistic capabilities, domestic dynamics, and regional and global activities—including its international influence operations. It also analyzes the activities of Iran's regional allies, particularly Hezbollah, Shi'ite militias in Iraq, and the Houthis in Yemen.

Israel and the Global Powers

This program explores the evolving dynamics of Israel's relations with major global powers and their implications for national security, particularly Israel's strategic relationship with the United States. The program also examines relations with Western and European democracies, as well as with revisionist and adversarial actors such as the CRINGE coalition, including China, Russia, Iran, North Korea and Global Extremists.

Cross-Arena Research

This program integrates legal, technological, economic, and additional cross-disciplinary perspectives into national security analysis. A key component is the INSS Data Analytics Center, which conducts quantitative research and produces evidence-based assessments across a broad spectrum of security-related issues.

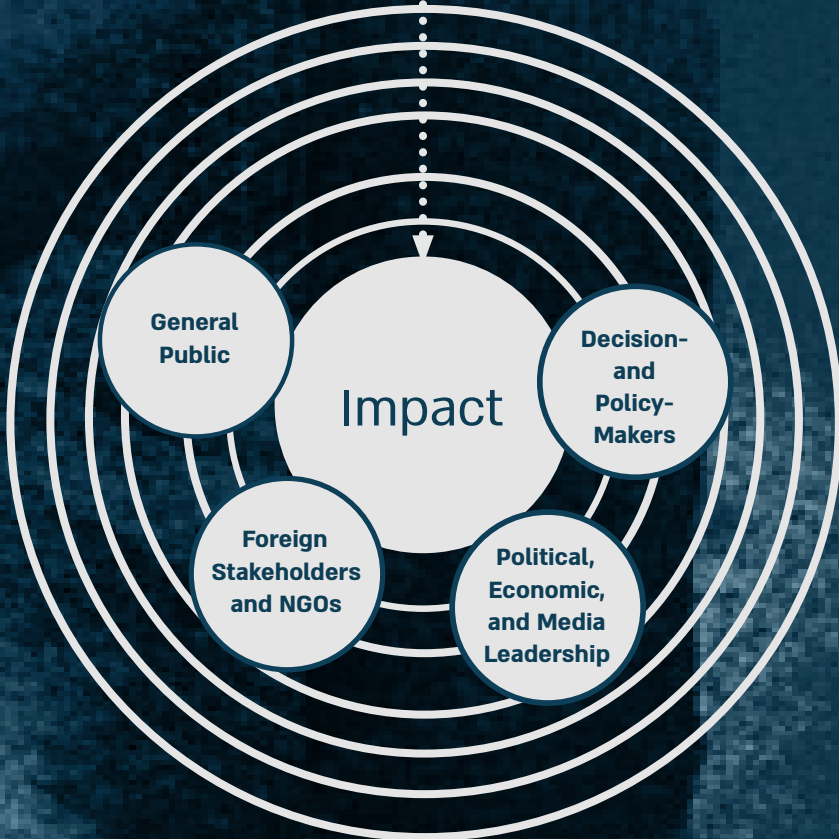
**National
Security
Policy**

**From
Conflict to
Agreements**

**Iran and the
Shi'ite Axis**

**Israel and
the Global
Powers**

Cross-Arena Research





Operation Rising Lion: INSS at the Strategic Crossroads of Combat and Policy

INSS involvement during the 12-day Operation Rising Lion against Iran underscores the unique role the Institute plays in shaping policy during times of crisis. Prior to the Operation, the IDF General Chief of Staff called upon INSS Executive Director Maj. Gen. (Res.) Tamir Hayman to serve as Shadow Commander of IDF Intelligence during the operation. This provided Hayman with operational access as well as the opportunity to positively influence military strategy, based on the depth and breadth of INSS Iran research.

Throughout this dynamic Operation, INSS Iran researchers, led by Dr. Raz Zimmt, were in huge demand providing hundreds of briefings to both domestic and international government officials, diplomats, and media outlets to help navigate an environment of deep uncertainty. Many of these briefings were based on the accurate and up-to-date operational picture provided by the INSS Data Analytics Center. Public opinion surveys conducted by the Center shortly after the launch of Operation Rising Lion, together with ongoing analysis of public discourse and emerging trends throughout the operation, helped inform decision-makers in Israel. The scope of our data-driven research has since been demonstrated by our various Regional Dashboards, which are continuously updated in real time.





Credit: Reuters

Iran's strategic predicament, following the significant setbacks of Operation Rising Lion (the 12-Day War), presented Israel with a volatile environment. While the June 2025 campaign successfully degraded Iran's nuclear infrastructure and some of its long-range missile capabilities, the INSS emphasized that this operation was "concluded but not resolved." Our researchers stressed the need to convert these military achievements into durable political outcomes; Israel and the US must navigate a landscape where Iran is motivated to reconstruct its program while facing a deepening domestic legitimacy crisis.

As of March 2026, Iran, the United States, and Israel are facing another round of armed hostilities, the strategic outcomes of which remain uncertain. In periods of heightened volatility, INSS provides the clarity and forward-looking analysis required by decision-makers to navigate immediate risks while safeguarding long-term regional stability.

"The Second Imposed War": Operation Rising Lion and Its Implications for Iran's National Security

Raz Zimmt

Memorandum
252
December

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Dr. Raz Zimmt is the Director of the Iran and the Shi'ite Axis research program at the Institute for National Security Studies (INSS). He holds a master's degree and a Ph.D. in Middle Eastern history from Tel Aviv University.



Credit: Ronen Topelberg

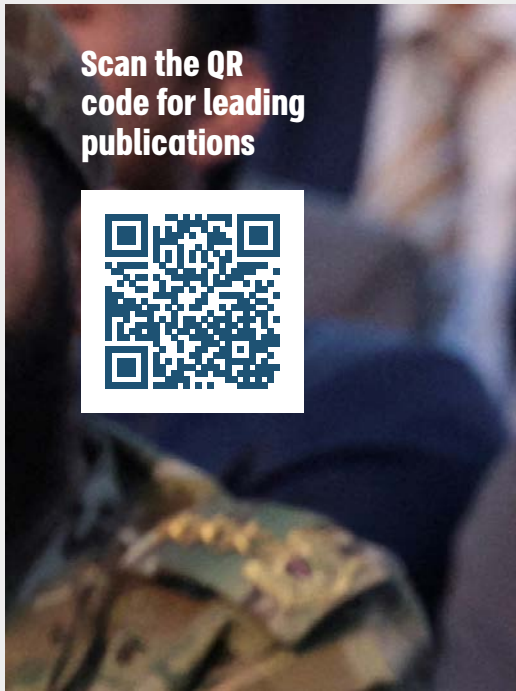
From Insight to Influence: Shaping Israeli Strategy in 2025

INSS' flagship projects are designed to translate rigorous research into tangible strategic outcomes. Each project is built to address pressing national security challenges while directly supporting decision-makers in Israel and the international arena. By combining informed responses, strategic foresight, and public legitimacy, INSS empowers key audiences to make effective, reliable decisions and to advance practical policies that strengthen Israel's security, resilience, and regional standing.

Strategic Planning for a Key Directorate in Israel's Defense Establishment

INSS was selected by a central directorate within Israel's defense establishment to serve as the research partner responsible for shaping its future role and organizational structure. This work includes assessing the post-war threat environment and redefining core reference threats.

A central component of the effort involves evaluating scenarios in which regional actors currently outside the conflict could shift toward hostility. Integrating these scenarios into the planning process carries significant implications for the directorate's operational assumptions, force design, and overall organizational structure.



Scan the QR code for leading publications



Strategic Engagement: Israel's Strategy Toward the Changing Dynamics in Syria

Following the fall of the Assad regime in Syria in January 2025, Dr. Carmit Valensi, INSS's Syria expert, and her team became a key source of analysis for Israeli security and governmental decision-makers, as well as diplomats and leading think tanks. They provided forward-looking assessments of potential scenarios and policy options for Israel's approach to the evolving Syrian arena.

Dr. Valensi cautioned that a unilateral and aggressive Israeli policy could increase military friction and expose Israel to heightened risks from multiple actors operating in Syria. This assessment was presented to the Prime Minister's Office, the Ministry of Foreign Affairs, and the National Security Council, and helped inform a recalibration of Israel's policy. It contributed to the decision to pursue a diplomatic track toward a negotiated arrangement with the al-Sharaa regime, under U.S. and broader international auspices.

Over the past year, Dr. Carmit Valensi has leveraged emerging communication channels between Israeli and Syrian stakeholders to facilitate structured Track II dialogues. These engagements are designed to move beyond ad hoc exchanges and toward the development of sustained, interest-based frameworks for cooperation through unofficial channels. Participants convene regularly in an expanded forum, working within dedicated thematic groups—security and strategy, economy and energy, and minorities and civil society. Within these groups, they collaborate on joint research initiatives that generate practical insights and policy-relevant recommendations.

Recognized for her expertise, Dr. Valensi was selected by the French Ministry of Foreign Affairs to participate in the Future Leaders Invitation Programme (PIPA).



Regional Dialogues: Maintaining Channels of Engagement in Times of Hostility

Track II and Track 1.5 dialogues with policymakers, think tanks, and research institutes closely connected to their respective governments are a central pillar of INSS's regional engagement.

These channels enable structured, policy-relevant exchanges that complement formal diplomatic efforts and help sustain communication across sensitive or constrained political contexts.



These dialogues are led by Raed Kadur, INSS Director of Regional Dialogues, who is responsible for cultivating and maintaining the Institute's network of relationships across the region. Kadur previously served as Head of the IDF Liaison Department, where he played a key role in shaping Israel's strategic security coordination with neighboring Arab states. Under his leadership, INSS maintains ongoing dialogues with counterpart institutions in Egypt, Jordan, the United Arab Emirates, Turkey, Morocco, and Somaliland.

Col. (res.) Raed Kadur, former commander of the Jordan Liaison Center and head of the Liaison Department, IDF Planning Directorate.

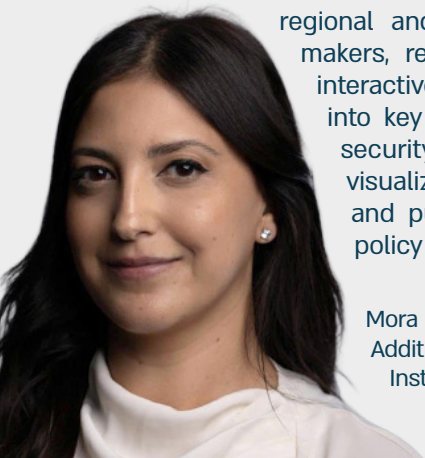
Joint Research and Cooperation

Apart from addressing crises, INSS's ongoing research on Iran continues to generate impactful findings. A joint study conducted with the Coleven nonprofit - Aircraft Under the Radar: Mechanisms of Evading Sanctions in Iran's Aviation Sector - exposed the methods used by the Iranian regime to circumvent international sanctions, raising significant global awareness. The findings, based on leaked internal Iranian correspondence and advanced open-source methodologies, were first reported exclusively in The Times (UK) under the headline How to Smuggle an Aircraft Off the Map. This exposure generated substantial international attention, leading to broader media coverage and follow-up engagements with senior officials in Europe.

This initiative also highlights INSS's ability to combine rigorous analysis, innovative partnerships, and targeted outreach to shape international policy discourse, strengthen sanctions enforcement, and safeguard the integrity of global civil aviation frameworks.

Transforming Strategic Analysis Through Data

The Institute's Data Analytics Center expanded its ability to translate complex regional and global developments into accessible analysis for decision-makers, researchers, media, and the broader public. Through advanced interactive maps and dashboards the Center provided real-time insights into key strategic trends, enabling users to better understand evolving security dynamics. By combining rigorous research with innovative digital visualization capabilities, the Center strengthened the accessibility, reach, and public impact of INSS analysis, while supporting more informed policy discussions in Israel and internationally.



Mora Deitch serves as the head of the Data Analytics Center. Additionally, she holds the position of research associate at the German Institute for Global and Area Studies (GIGA) and is a Ph.D. candidate in the Political Studies Department at Bar-Ilan University.

Shifting the Narrative: Advancing a New Model for Breakthrough – A Palestinian Entity with Limited Sovereignty (PELS)

The Conflict to Arrangements research group has made significant contributions to shaping Israel's "day after" strategy in Gaza, while advancing a new conceptual framework for conflict resolution and its corresponding security architecture. This work has informed civilian planning for Gaza's post-war phase.

Led by Udi Dekel, the initiative explores the application of the DDR framework (demilitarization, disarmament, and reintegration) in Gaza. It has been advanced through a series of dialogues in the United Kingdom and engagements with the U.S.-led Civil-Military Coordination Center (CMCC) in Kiryat Gat, Israel.

Challenging the prevailing assumption that security can be achieved solely through territorial control and settlement, the program promotes an alternative approach. It highlights the potential security advantages inherent in the establishment of a Palestinian Entity with Limited Sovereignty (PELS). The concept has been published and now serves as a foundation for the Institute's policy recommendations to political actors ahead of the upcoming elections.

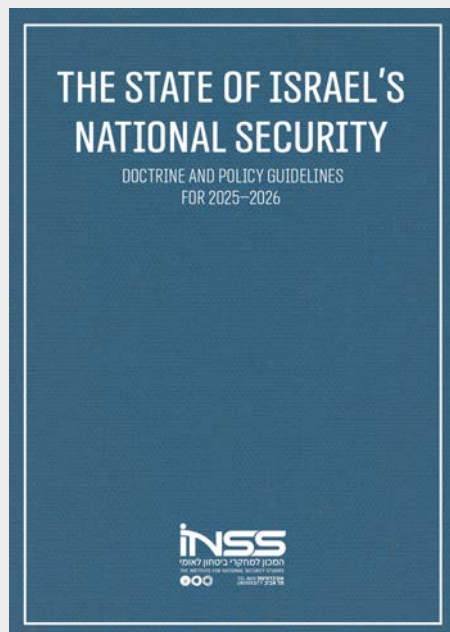


Approval of the National Security Strategy Law

In 2025, the National Security Strategy Law completed its legislative passage, formally requiring the government to formulate and present a comprehensive, long-term national security strategy. For the first time, the law has institutionalized a structured approach to strategic planning and has established a mechanism for parliamentary oversight.

The legislation builds on years of professional work by researchers affiliated with INSS, led by Ofer Shelah, and reflects a broad consensus on the need to strengthen Israel's strategic planning processes.

In parallel, the Institute updated its annual flagship publication, The State of Israel's National Security Strategy and Policy Guidelines for 2025–2026, positioning it as a practical tool for the National Security Council, the government, and the broader defense establishment.



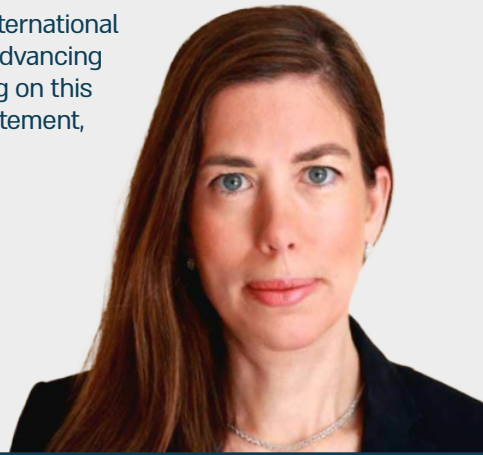
The Quantum Horizon and National Security

Recognizing that artificial intelligence and quantum technologies will be central to future national security, INSS launched the Quantum Horizon initiative. The program established a dedicated ecosystem bringing together decision-makers, regulators, researchers, and industry leaders to analyze key barriers, identify strategic needs, and assess security implications.

Through this initiative, INSS has become a central actor in Knesset and National Security Council discussions on artificial intelligence, contributing to the shaping of Israel's emerging policy in this domain. In parallel, in cooperation with its U.S. partner, the Foundation for Defense of Democracies (FDD), the Institute helped anchor Israel's strategic value in the context of the U.S. Department of Defense budget process (FY2026 NDAA). This partnership supports the long-term institutionalization of U.S.–Israel cooperation in advanced technologies, including artificial intelligence and cyber.

More recently, Israel joined the U.S.-led Pax Silica initiative, an international effort focused on economic security in AI and supply chains, advancing a shared framework among allies and trusted partners. Building on this momentum, Israel and the United States signed a Joint AI Statement, with Israel becoming the first country to do so.

With over 25 years of experience in national security, intelligence, and international relations, Hadas Lorber leads the INSS project focused on strengthening Israel-U.S. relations.



The Institute for National Security Studies (INSS) is honored to host a special event with

Prof. John M. Martinis, Nobel Laureate in Physics 2025

Tuesday | December 2, 2025 | 10:00–12:00

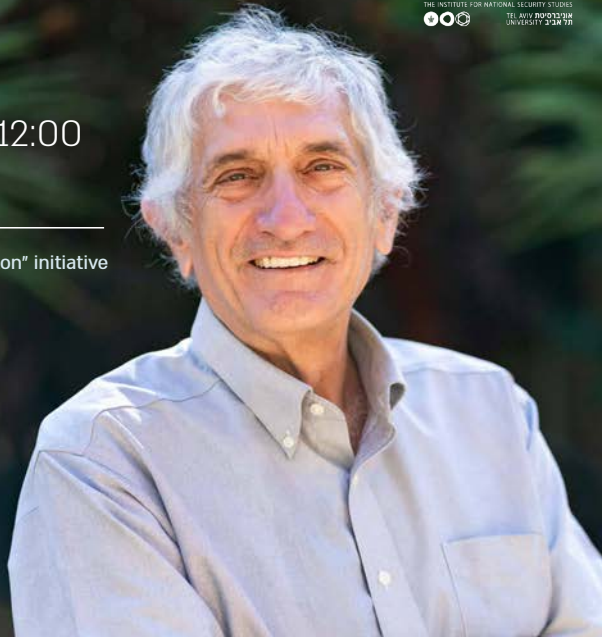
40 Haim Levanon St., Tel Aviv

Program

- 10:00** Reception
- 10:30** Opening remarks and presentation of the INSS “Quantum Horizon” initiative
- 10:45** Lecture and conversation with Prof. John M. Martinis

Prof. Martinis's visit to Israel takes place shortly before his Nobel Prize ceremony in Sweden and ahead of his planned meeting with President Trump at the White House.

His visit presents a unique opportunity to advance the Quantum Horizon initiative led by the INSS and the Israeli quantum ecosystem, fostering connections with the global scientific community and U.S. decision-makers. This dialogue highlights Israel's growing assets in the quantum domain and the potential for strategic cooperation with the United States.






Convening Strategic Communities

Credit: Ronen Topelberg

INSS conferences and policy forums serve as key convening platforms, bringing together senior policymakers, leading researchers, journalists, diplomats, military attachés, and private sector representatives. These high-level gatherings create a unique intersection between research and decision-making, enabling direct, substantive engagement across communities that rarely interact within a single forum.

By fostering informed dialogue grounded in rigorous analysis, INSS events play a critical role in advancing the Institute's policy recommendations, amplifying their visibility, and translating research into actionable strategies. At the same time, these forums strengthen researchers' professional networks and expand INSS's reach, enhancing the Institute's ability to shape policy debates in Israel and internationally.





Looking Ahead—2026 and Beyond

INSS's goals for 2026 center on shifting from reactive analysis to the proactive shaping of policy choices and outcomes. The Institute's work emphasizes policy relevance, implementation, and sustained engagement with decision-makers, with the aim of further strengthening its impact. Current projects are well positioned to serve as central reference points for strategic thinking, translating long-term challenges into actionable and coherent policy frameworks. Together, they are guided by a shared objective: safeguarding Israel's long-term national security, democratic foundations, and strategic partnerships amid deep uncertainty and an evolving global order.

INSS integrates hard security issues—including Iran, nuclear proliferation, IDF force design, and home front preparedness—with structural and societal challenges such as civil–military relations, crime in Arab society, antisemitism, and Israel–U.S. relations. At the same time, the Institute advances work in forward-looking domains, including deep technologies, energy security, and regional economic connectivity. Throughout, INSS maintains close relationships with decision-makers in Israel, the United States, Europe, and across the region, while preserving its analytical independence.

Policy Toward Iran—Amid Renewed Hostilities

The regional landscape has shifted from the fragile stability that followed the 2025 “12-Day War” to a period of high-intensity conflict. The ongoing U.S.–Israeli campaign to degrade Iran's internal security apparatus and strategic capabilities has effectively closed the previously envisioned window for a managed transition, replacing it with a volatile contest over the region's future order.

Israel's strategic focus has accordingly evolved—from raising the threshold for nuclear breakout to managing the risks and opportunities associated with a potential regime crisis. In this period of acute uncertainty, where outcomes remain fluid, INSS's role as a source of rigorous, real-time analysis is more critical than ever. The Institute's mission is to provide decision-makers with the clarity needed to navigate the present crisis while helping shape a “day after” that supports long-term regional stability.

Regional Power Index—A Net Assessment of Israel's National Security

During 2026, INSS will launch the beta version of the Regional Power Index, an interactive, continuously updated platform that maps the distribution of power across the Middle East. Drawing on a range of hard and soft power indicators—economic, military, and diplomatic—the Index will provide a data-driven assessment of Israel's relative strengths and vulnerabilities, as well as those of key regional actors.



By integrating diverse data streams, including material capabilities, emerging technologies, and soft power assets, the Index will offer a structured and comparative view of regional dynamics. This transparent, data-driven tool will complement and enhance INSS's qualitative research, strengthening its analytical depth and policy relevance.

The defense establishment will benefit from ongoing access to updated data, while broader audiences will engage with the Index through publications and media exposure. Over time, this visibility is expected to generate increased demand for tailored analyses and dedicated reports among stakeholders, including the civil intelligence community, research institutes and think tanks, financial institutions, and the business sector.

Israel US Relations—Antisemitism, Socio-Political Trends, and Relations with American Jewry

This issue is widely recognized yet inherently complex to address. It requires a nuanced understanding of contemporary antisemitism, including the role of external actors in shaping public discourse in the United States. At the same time, it demands careful attention to the evolving relationship between Israeli and American Jewry, and to the risks of growing distance or marginalization.

Addressing these challenges ultimately depends on effective political and policy frameworks. While difficult, this effort is essential to maintaining Israel's social cohesion, international partnerships, and broader national security.

Energy Security for Israel

Energy underpins critical domains, including artificial intelligence, computing capacity, water systems, and food security. Ensuring Israel's long-term energy stability is therefore essential to its national resilience and security.

Through rigorous analysis and forward-looking policy recommendations, INSS will provide the Israeli government with proposals for necessary reforms to strengthen energy security while enhancing Israel's capacity to address climate-related challenges.

Home Front in Wartime

As the civilian home front plays a central role in the current conflict—and is expected to remain pivotal in future scenarios—there is a clear need for a comprehensive policy framework to guide its organization and management.

This research project aims to strengthen Israel's internal resilience during wartime, enhance civilian adaptability, and improve response times. It also seeks to enable the IDF to focus on its core military missions, while minimizing its involvement in civilian governance and socio-political functions beyond the appropriate scope of a military institution in a democratic state.

Arab Society—Law, Order, and National Security

Rising levels of crime within Arab society in Israel present a significant challenge with broad societal and national security implications. Persistent disparities in law enforcement between Jewish and Arab communities risk undermining social cohesion and public trust, with potential spillover effects beyond the communities directly affected.

This dynamic has contributed to the entrenchment of organized crime networks, which, if left unaddressed, could intersect with broader security risks. To examine this issue, INSS is engaging a former senior official from the Israel Security Agency (Shin Bet), who previously oversaw matters relating to Arab communities in East Jerusalem and other parts of Israel.

The research analyzes policy measures implemented under the Bennett–Lapid government, which were associated with a reduction in crime in Arab communities, and assesses their applicability going forward. Building on these insights, INSS seeks to formulate a multi-year policy framework aimed at strengthening personal security while supporting deeper civic integration of Arab citizens in Israel.

Simulation Center

The new INSS Simulation Center will provide a dedicated environment for modeling and analyzing political-military crises and strategic interactions. Its purpose is to test assumptions, explore alternative scenarios, and generate well-grounded, policy-relevant insights and recommendations.

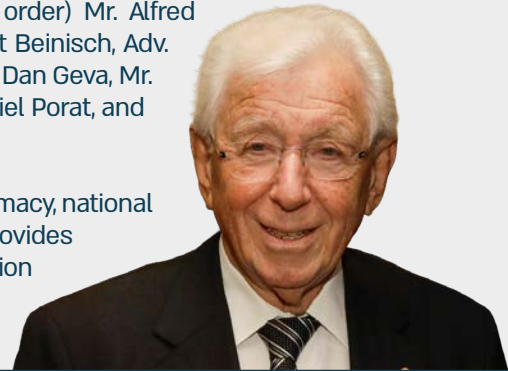
Beyond serving the national security community, the Center will offer advanced consulting and training services to government and business sectors, adapting strategic planning and security methodologies to civilian contexts. Engagement with these audiences will further expand INSS's analytical capabilities and those of its partners, particularly in examining how societal resilience is shaped by supply chains, climate-related pressures, and economic volatility within an increasingly interconnected global system.



Governance

The INSS Board of Directors is chaired by **Sir Frank Lowy, AC**, and Vice Chairmen Professor Itamar Rabinovich and David Lowy. The Board comprises prominent leaders from Israel and abroad, including (in alphabetical order) Mr. Alfred Akirov, Brigadier General (Res.) Reem Aminoach, Justice Dorit Beinisch, Adv. Hanina Brandes, Sir Mick Davis, Professor Jacob Frenkel, Adv. Dan Geva, Mr. Michael Granoff, Ms. Inbal Kreiss, Ms. Tzipi Livni, Professor Ariel Porat, and Professor Eyal Zisser.

Bringing together distinguished figures from academia, diplomacy, national security, law, finance, technology, and business, the Board provides strategic guidance and oversight that reinforce INSS's position as Israel's leading independent institute for national security research and policy analysis.



INSS Partners' Forum

The Partners' Forum, comprised of prominent business and public figures, convenes for regular security briefings, roundtable discussions, field trips and other events to learn about and address key challenges to Israel's national security. These opportunities expose Forum members to "behind the scenes" thinking while drawing on their extensive experience in other realms to enrich and enhance the formulation of INSS recommendations and strategies.

INSS is funded by philanthropic contributions from Israeli and international friends and foundations, enabling it to maintain its independence. Support from Partners' Forum members enable the INSS to extend its reach and increase its impact at a time when Israel faces unprecedented challenges from within and without. Whereas participation in the Forum entails a minimum annual membership fee of US\$ 10,000, the INSS welcomes further generous donations to support specific long- and short-term projects.

Laura Gilinski will be pleased to provide additional information on the Forum or on specific projects at laurag@inss.org.il.

Scan the QR code to make a contribution.





Credit: Ronen Topelberg

Our Mission

Safeguard Israel's sustainable future as the democratic nation-state of the Jewish people, reinforce its position as a regional power, and anchor its place within the community of liberal democracies.

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