

Early Warning Revisited: A Tool for Identifying “Relevancy Gaps” in the IDF Concepts - Col. (res.) Dr. Itai Shapira

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Introduction

This study offers a reexamination of the concept of early warning in the Israel Defense Forces (IDF), in light of the strategic surprise experienced by Israel in October 2023. The root of this surprise lies, first and foremost, in an intelligence failure to provide early warning for Hamas’s surprise attack on October 7th. However, the surprise also stemmed from an ongoing failure - on the part of both the intelligence community and the senior command of the IDF ¹ - to identify the emergence of relevancy gaps in Israeli conceptions regarding Hamas, particularly those related to Israeli deterrence and defense.

The traditional approach within the IDF views early warning as an intelligence product focused on analyzing the enemy’s intentions and capabilities, primarily aimed at

¹ The study focuses on the military echelon rather than on the senior political leadership.

reducing situational surprise. Such early warning is designed to prevent a state of unpreparedness - in time or space - in responding to an enemy-initiated attack.² More broadly, early warning serves as a central pillar of Israel's security doctrine (at least until October 2023) and of the IDF's strategy (at least until recent years). However, according to the traditional approach, early warning is perceived and implemented primarily as a standalone measure, aimed at preventing surprise, rather than in relation to the other components of the security doctrine, such as decisive victory, defense, and deterrence.³ The current study recommends viewing early warning - alongside the traditional approach and not in its place - as a product intended to identify the emergence of shifts in the strategic environment that challenge Israeli paradigms, and the assumptions underlying these paradigms. Such early warning could reduce the risk of fundamental surprise rather than just situational ones and assist the senior IDF command in identifying the emergence of relevancy gaps. The creation of this early warning, therefore, requires a partnership between intelligence and commanders.

The study opens with a review of academic literature concerning the concepts of 'early warning', 'surprise', and 'deterrence'. It then presents the Israeli context of this literature review, including references to the security doctrine, the IDF's strategy, and the military's use of the term 'relevancy gaps'. Following a discussion of the October 2023 events through these lenses, the study offers a renewed examination of early warning.

From a practical perspective, the study aims to inform the development of operational and force buildup concepts in the IDF, as well as to support the revision of Israel's security doctrine, at least at the military level, considering the events of October 2023. From a theoretical perspective, the study aims to advance the scholarly discussion on the role of intelligence in shaping - not merely executing - security and military concepts in Israel. Accordingly, the study may also contribute to a broader debate on the interaction between intelligence and the IDF's senior command in the context of early warning, surprise, and deterrence.

Theoretical Background

Surprise and Early Warning

The academic literature presents the reduction of uncertainty for decision-makers as one of the core functions of intelligence (Fingar, 2011). Accordingly, early warning is framed as an intelligence product aimed at reducing the risk of surprise, thus preventing strategic surprises (Gordon & Gentry, 2018; Dahl, 2013).

Strategic surprise has been the subject of extensive research in recent decades from a variety of perspectives (Barun, 2021, pp. 110–121), primarily through analyses of intelligence failures. For several decades, scholarship focused on cases where surprise stemmed from failures to detect military surprise attacks, such as the Japanese attack on Pearl Harbor in 1941 (Wohlstetter, 2023), the German assault on the Soviet Union in the same year (Murphy, 2005), and in the Israeli context, the Arab surprise attack at the outbreak of the 1973 Yom Kippur War (Bar-Joseph, 2001). From a broader perspective, strategic surprises have been examined in cases of fundamental shifts in the balance of

² The terminology regarding situational and fundamental surprise is derived from Zvi Lanir's book (Lanir, 1983)

³ The study does not address the question of what constitutes Israel's security doctrine, nor does it examine which of its components may require revision in the aftermath of October 2023. It relies exclusively on the commonly accepted terminology, as presented in open sources (Bar, 2024).

power - such as the Cuban Missile Crisis in 1962 (Zegart, 2012) or the collapse of the Soviet Union and communist regimes in Eastern Europe between 1989 and 1991 (Kuran, 1991; Berkowitz, 2008). In more recent decades, both early warning and surprise have been studied in the context of terrorist attacks, including the September 11, 2001 attacks in the United States (Byman, 2005).

The current study builds on this body of literature, drawing on Efraim Kam's perspective regarding three dimensions of surprise and its severity, mainly focusing on the first one:

1. A gap between the expectations of the 'victim of surprise' and the actual course of events;
2. A shortfall in preparing for the surprising event, especially with respect to timing and place; and
3. A lack of readiness on the part of the 'victim of surprise' to effectively respond to the event (Kam, 1990).

Many of Kam's conceptual elements resonate with Zvi Lanir's description of fundamental surprise and situational surprise, particularly in the context of the intelligence failure during the Yom Kippur War (Lanir, 1983). Lanir argued that Israel experienced a fundamental surprise in that war - not merely due to a failure to anticipate the timing or location of the Arab attack, but [because of] "a deeper realization that Israel's self-image, including perceptions of its military and societal strength, was flawed" (*ibid.*, p. 40). Accordingly, Lanir emphasizes that fundamental surprise - which he also refers to as 'shock' - stems from the gradual development of "a distorted worldview". In contrast, according to Lanir, situational surprise refers to an unexpected action by an adversary that still falls within the victim's existing cognitive and conceptual framework.

Kam and Lanir both emphasize that surprise is not merely a consequence of the adversary's behavior but is also shaped by the interpretive framework of the party experiencing the surprise. This perspective is echoed in the seminal literature about early warning and surprise. Klaus Knorr, in his analysis of the 1962 Cuban Missile Crisis, distinguishes between technical surprise and behavioral surprise (Knorr, 1964). Regarding the latter, Knorr argues that surprise emerges when an adversary acts in a manner that deviates from the set of expectations held by the target of the surprise.

Leading scholars argue that intelligence failures in early warning and prevention of surprises are inevitable due to inherent cognitive biases among intelligence professionals - particularly those engaged in analysis (Betts, 1978). As a result, the mainstream literature tends to attribute such failures primarily to analytic shortcomings - such as a 'failure of imagination' or the persistent clinging to preconceived assumptions - rather than to deficiencies in intelligence collection.

Richard Betts maintains that in cases involving factual-technical early warning, the primary challenge lies in intelligence collection, whereas in contingent-political early warning, the core of the effort lies in intelligence analysis (Betts, 1988). Uri Bar-Joseph and Rose McDermott underscore the importance of the 'human factor' in failed early warning, that is, the role played by the psychological tendencies of intelligence analysts and senior decision-makers in shaping these failures (Bar-Joseph & McDermott, 2017).

Early Warning, Surprise, and Deterrence

The collapse of one's deterrence over the enemy is a clear manifestation of surprise resulting from a flawed set of assumptions and perceptions about this enemy. In such cases, surprise arises when it becomes evident that the attempt to reduce the adversary's motivation to initiate offensive action has failed- through deterrence by punishment or by denial.

Robert Jervis emphasizes that deterrence is inherently dependent on each party's perceptions of the other. Thus, the collapse of deterrence reflects a failure to understand the adversary's preference for taking the initiative over other available options (Jervis, 1988). Michael Handel analyzes several cases of failed early warning that resulted in strategic surprise, including Israel's failure in the 1973 Yom Kippur War (Handel, 1977). Among other points, Handel argues that in many cases, it becomes clear in retrospect that the victim of surprise preferred to maintain the status quo and, assuming that the adversary shared that preference, concluded that the adversary was unlikely to take action to alter it. James Wirtz also presents historical examples in which the weaker party succeeds in achieving surprise, effectively demonstrating the collapse of the stronger side's deterrence (Wirtz, 2017).

At this point, a conceptual link can be drawn between surprise, early warning, and deterrence. Strategic surprise might occur when intelligence fails to provide early warning of a collapse in deterrence - that is, when it fails to recognize that the adversary is no longer deterred from challenging the status quo.⁴

The conceptual link between surprise, early warning, and deterrence is therefore shaped, in part, by the interaction between intelligence professionals and decision-makers. While the former are responsible for producing early warning (Grabo, 2002), the latter are tasked with formulating deterrence. However, intelligence does not operate in a vacuum but within the context of concrete policy (Chan, 1979) and therefore must identify changes in the strategic environment that influence both policy and operations. Consequently, intelligence must maintain a delicate balance in its interaction with decision-makers. On the one hand, as noted above, intelligence personnel must understand the assumptions and considerations of decision-makers to generate relevant early warnings. On the other hand, they must avoid politicization, that is, the distortion of intelligence assessments to serve political ends (Rovner, 2011). Politicization, for example, may occur when intelligence organizations produce assessments that reinforce commanders' existing assumptions about the effectiveness of the deterrent posture their policies have created. Implicitly, this entails intelligence assessments that fail to critically examine decision-makers' underlying assumptions about the strategic environment - such as the ability to deter the adversary.

The Israeli Perspective

Academic and Professional Research

The main context for the study of early warning and surprise in Israel - at least until the events of October 2023 - has been the intelligence failure during the 1973 Yom Kippur War. This failure, implicitly understood as a failure to warn of an enemy-initiated war launched by surprise attack, has served as the foundational case study for much of the Israeli literature. This body of work includes both academic research by Israeli scholars (e.g., Bar-Joseph, 2001; Shapira, 2023a; Kahana, 2002; Ben-Zvi, 1997) and professional writings by former senior officials in Israel's defense and intelligence establishment (e.g., Barak, 1985; Gazit, 2003; Barun, 2021), as well as by intelligence officers who held key positions during the Yom Kippur War (e.g., Zeira, 1993; Shalev, 2006; Ben-Porat, 1991; Zamir & Mass, 2011; Gilboa, 1988; Levran, 1980; Ya'ari, 2013).

The Israeli literature explores a wide range of intelligence aspects related to early warning and surprise - primarily through the lenses of organization, process, and

⁴ The adversary's decision-making calculus leading to the initiation of an attack is not solely determined by its level of deterrence. See, for example: Finkel, 2016.

product.⁵ When addressing the intelligence function of early warning, this literature has generally focused on the intelligence organization itself, rather than on the interface between intelligence and decision-makers. It often treats early warning as a purely intelligence-generated product, rather than a joint product developed through interaction between intelligence and national leadership. For example, in an article published while serving as the Head of the IDF Intelligence Directorate (Aman, later referred to in this article as “IDI”, Israeli Defense Intelligence), Ehud Barak discusses different models of intelligence organizations that can support the decision-makers in processing the intelligence assessment (Barak, 1985). However, when discussing early warning specifically, Barak focused exclusively on the perceptual and procedural challenges within the intelligence system - rather than those faced by the commanders. Similarly, Shlomo Gazit, who served as head of the IDI following the Yom Kippur War, viewed early warning as an intelligence product intended to prompt decision-making by the national leadership - rather than as a product co-developed with them (Gazit, 1981; Gazit, 2003).

Although Israeli literature acknowledges the responsibility of decision-makers in conducting their own intelligence analysis, it rarely addresses the partnership between intelligence and commanders in mitigating surprise caused by the decision-makers’ own misconceptions about the strategic environment. This tendency is also reflected in the writings of senior commanders and policymakers. For instance, former IDF Chief of General Staff Haim Laskov addressed the problem of strategic surprise, emphasizing the need for commanders to engage in critical thinking about the adversary (Laskov, 1976). Laskov, whose perspective is revisited at the conclusion of this study, highlighted the importance of critical reasoning and need to avoid groupthink. Another former IDF Chief of General Staff, Haim Bar-Lev, asserted that the Chief of General Staff must conduct an independent assessment regarding the likelihood of war, rather than relying exclusively on the intelligence chief’s evaluation (Bar-Lev, 1988). Moshe Ya’alon, who previously served as Head of the IDI, Chief of General Staff, and Minister of Defense, similarly argued: “The moment the policymaker adopts the intelligence assessment, they too become responsible for it, and in effect both parties then share responsibility” (Ya’alon, 2007, p. 14).

Eli Zeira, who served as Head of the IDI during the Yom Kippur War, likewise contended that policymakers and intelligence officers share joint responsibility for producing early warning and analyzing enemy intentions (Zeira, 1993). Yehoshafat Harkabi, considered one of the founding fathers of Israeli intelligence in the 1950s, also stressed that decision-makers must form their own independent assessments regarding the enemy - even when these diverge from analysis created by the intelligence organizations (Harkabi, 2015).

Aharon Levran’s article constitutes a rare example of literature addressing the partnership between intelligence and operational command in the context of surprise. At the time of the Yom Kippur War, Levran served as Deputy for Operations to the Head of the Research Department in the IDI (now the Research Division). Levran argued in this context: “The question of surprise is not solely the responsibility of intelligence [...] responsibility in this matter must be shared [...] Intelligence personnel do not operate in a vacuum. They draw from their strategic environment” (Levran, 1980, p. 20). Implicitly, Levran refers to a shared cognitive and operational discourse environment between

⁵ This approach to intelligence is based on the terminology proposed by Sherman Kent - considered the “founding father” of American intelligence after World War II. Kent conceptualized intelligence as knowledge (the product), activity (the process), and organization (Kent, 1949).

intelligence and commanders. A similar perspective is also presented in the important article written by Shai HersHKovitz and David Simantov which will be discussed in the following section.

A Unique Perspective on Early Warning

HersHKovitz and Simantov, as well as HersHKovitz in a separate article, analyzed the development of the concept and practice of early warning in Israel - primarily within the IDI - during the 1950s (HersHKovitz & Simantov, 2011; HersHKovitz, 2017). The current research draws on this foundation, which corresponds with many of Kam's and Lanir's concepts of surprise mentioned earlier.

HersHKovitz and Simantov identify three distinct levels of early warning, each defined by its intended purpose. Strategic early warning is intended to highlight changes in the strategic environment and thereby prompt a discussion of strategy, including redefinition of the actors involved and the conceptual frameworks through which they are analyzed. Operational early warning is intended to serve as a basis for implementing an operational concept by the "blue" (friendly forces), while tactical early warning indicates a concrete change in terms of time and space - requiring the "blue" to adjust their deployment. Considering this, the authors argue that early warning is not solely the domain of intelligence organizations, as it requires the joint development of knowledge with decision-makers.

HersHKovitz and Simantov do not focus solely on early warning of a surprise attack that culminates in strategic surprise. Rather, they adopt a broader perspective, addressing changes in the strategic environment that necessitate a reassessment of strategy and operational concepts, and exploring the interaction between intelligence and decision-makers. The framework they propose can also be applied to analyze the central issue addressed in the remainder of this study: the role of early warning in identifying gaps in "Blue's" assumptions and perceptions regarding the strategic environment. This issue will be explored in the following chapter, which examines Israeli security doctrine and the relationship between early warning, deterrence, and defense.

Israel's Security Doctrine

Israel's security doctrine has not been codified in an official document since its formulation in the 1950s, although several efforts have been made to revise and adapt it to emerging challenges in recent decades (Bar, 2024). The doctrine reflects a distinctive Israeli strategic culture that identifies existential threats in the environment, requiring exceptional responses. As a general principle, Israel seeks to avoid war and to postpone its outbreak as much as possible. If a war breaks out, Israel aims to shorten its duration, achieve a swift decisive outcome, and shift the fighting onto enemy territory (Shapira, 2023b). The security doctrine rests on several pillars: a strategic alliance with the United States, technological superiority, preservation of national independence and freedom of action (Amidror, 2020), and, according to some scholars, the prevention of the emergence of strategic threats (Matania & Bacharach, 2023). Within the context of this study, the security doctrine also relies on four core components: deterrence, early warning, decisive victory, and defense (Bar, 2024).

Ehud Barak describes the centrality of early warning in Israel's security doctrine, stating: "Intelligence early warning is, in a sense, the Archimedean lever of the entire concept. Without the ability to provide early warning, the very notion of maintaining a normal way of life in the State of Israel is inconceivable." (Barak, 1985, p. 2). Early warning is therefore intended to prevent strategic surprise resulting from a sudden enemy attack. The connection between early warning and other components of the security doctrine, especially deterrence, is rarely mentioned explicitly.

In recent decades, the role of early warning within Israel's security doctrine has been reconsidered. For example, in April 2006, a committee chaired by Knesset member Dan Meridor submitted its recommendations for updating the security doctrine (Meridor & Eldadi, 2018). The document stated: "A wide range of threats and scenarios require early warning—ranging from deep-rooted changes (both positive or negative) to operational early warnings for both large-scale conflicts and limited force deployment scenarios." (ibid., p. 20). However, the document does not view early warning as a tool through which decision-makers, together with the intelligence community, assess the relevance of the other components of the security doctrine.

Gadi Eizenkot and Gabi Siboni also published a proposal to update Israel's security doctrine in 2019 (Eizenkot & Siboni, 2019). This proposal is partly based on the IDF Strategy Documents (2015, 2018) published by Eizenkot during his tenure as Chief of General Staff, which will be discussed later in this study. Regarding the intelligence issue, Eizenkot and Siboni's document recommends adopting the term 'intelligence superiority', which they view as encompassing a broader concept than early warning alone: "intelligence superiority to achieve timely early warnings that will enable Israel to thwart enemy intentions to harm it." (ibid., p. 10). Additionally, they claim that "Timely early warning allows for formulating an appropriate response to threats and eliminates the need for constant readiness, thereby preventing the rapid depletion of the country's resources." (ibid., p. 47).

Like the Meridor Committee, Eizenkot and Siboni emphasize that the context of early warning is no longer limited to sudden invasion scenarios involving conventional armies: "This intelligence capability was intended for a scenario in which Israel is attacked by invading military forces [...] However, the changing nature of threats requires an updated conceptualization of the term 'early warning', since a massive short-range rocket barrage, for example, does not necessitate prolonged preparations." (ibid.). They further assert: "Israel's intelligence agencies must continue to provide strategic intelligence, including on potential strategic shifts in the region as well as trends in the enemy's force build-up. This information is essential for the planning of Israel's own force development" (ibid., p. 48).

Thus, Eizenkot and Siboni view early warning - and intelligence more broadly - as tools for identifying changes that necessitate shifts in Israeli strategic conduct. In doing so, they effectively argue - albeit not explicitly - that early warning is intended to help shape relevant Israeli strategic perceptions. However, they too do not explicitly address the connection between early warning and deterrence, decisive victory, or defense. Moreover, in their view, the responsibility for early warning lies with the intelligence community rather than with senior commanders.

In contrast, Shai Shabtai explicitly addresses the linkage between early warning and the other core components of the security doctrine: "Intelligence early warning is an integral part of defining and implementing other fundamental concepts; for example, it is part of the concept of decisive victory, as it enables the timely mobilization of reserve forces required to achieve it, or it may indicate in advance a potential erosion of deterrence" (Shabtai, 2010, p. 13). Implicitly, Shabtai suggests thinking of early warning as a component of the broader Israeli security doctrine, rather than solely as a standalone element within the analysis of enemy intentions and capabilities. Similarly, Yossi Baidatz and Dima Adamsky note in a comprehensive study on the Israeli approach to deterrence that "early warning is intended to signal the collapse of deterrence" (Baidatz & Adamsky, 2014, p. 15). This is the approach adopted by the current research.

Early Warning in the IDF

Meir Finkel analyzes, in his research on IDF Strategy Documents from 2002 to 2018, how the IDF's strategy reflects the incumbent Chief of General Staff's perception of the strategic environment and the required military response both in terms of force deployment and force buildup (Finkel, 2020). In the following section, we will build on this analysis and examines the role of early warning in the IDF Strategy Documents published in 2015 (Office of the Chief of General Staff, 2015) and in the update issued in 2018 (Office of the Chief of General Staff, 2018) - both during Gadi Eizenkot's tenure as Chief of General Staff.

These documents notably address early warning not only in the context of war but also as a tool for identifying strategic shifts (Simantov, 2016). Therefore, the IDF views early warning as a tool to reduce strategic surprise not only regarding wars initiated by enemy surprise attacks. As Simantov argued: "Following changes in the strategic environment, both strategic and operational early warning have lost much of their importance [...] The reason is that the scenario of a war initiated by an Arab state currently has - and for the foreseeable future will have - a very low probability" (ibid., p. 120).

The terms 'deterrence', 'decisive victory' and 'defense' are extensively discussed in the IDF's 2015 and 2018 Strategy Documents. However, these documents do not explicitly discuss how early warning should identify the collapse of deterrence or gaps in the defense concept. Moreover, the roles of intelligence are presented more broadly than just early warning of war. First, the documents emphasize the importance of both systemic and tactical intelligence as a foundation for force deployment and, among other things, for achieving decisive victory in war. Second, the documents employ the concept of 'intelligence superiority', mentioned earlier, which encompasses the need to achieve collection success of enemy secrets, to anticipate significant developments in enemy intentions and capabilities, and to prevent the enemy from attaining their own intelligence gains. These trends may indicate a diminished centrality of strategic early warning of war within the IDI.

Another indication of the declining centrality of early warning can be found in an article published by senior IDI officials in 2020. As part of their discussion on professional aspects within the multi-year force buildup plan, the authors refer to intelligence superiority as the foundation for a "revolution in intelligence affairs", and consequently, for a process of conceptual change within the IDI (D, A & R, 2020). The authors view intelligence superiority as a broad and relevant concept, defining it as follows: "A set of capabilities that enable the fulfillment of the operational objectives of the IDF and the political echelon [...] through high-quality intelligence that is timely (and sustained over time), delivered at scale, and with relevant flexibility - all while staying ahead of the enemy and exposing it" (ibid., p. 199). In addition, the authors argue: "In the past, it was customary to assess intelligence within its traditional role as the Intelligence Officer, responsible for providing early warning of war [...] Today, Military Intelligence fulfills three primary missions: Intelligence as a reality interpreter, Intelligence as an operator (executing force employment missions), and Intelligence as a force multiplier on the battlefield" (ibid., p. 204).

In recent years, a new conception has emerged within the IDF and IDI, viewing wars as the outcome of "escalation dynamics" or "unintended escalation". Operation 'Protective Edge' (2014) is often cited as a clear illustration of such a scenario. The intelligence challenge regarding unintended escalation - a phenomenon thoroughly analyzed by Amit Sa'ar (then a student at the National Defense College and later Head of the Research and Analysis Division in the IDI) in 2019 - does not lie in providing early warning of a surprise attack, but rather in analyzing the evolving interaction between the "Red" (enemy forces) and the "Blue" (Sa'ar, 2019). Addressing the phenomenon of

“unintended escalation” may also contribute to the declining centrality of strategic early warning of war - that is, early warning of a surprise attack.

We now turn to examine the role of early warning in the IDF’s concept of force employment (“The Operational Concept for Victory”) formulated during the tenure of Aviv Kochavi as Chief of the General Staff in 2019, and in the multi-year force buildup plan, ‘Tnufa’, designed to enable the implementation of this concept. “The Operational Concept for Victory” focuses on achieving decisive victory over the enemy and emphasizes the defensive dimension (Kochavi, 2020). At its core is the understanding that the enemy - primarily the “terror armies” (Hizballah, Hamas) and Iran - have built their capabilities in ways that neutralize the long-standing advantage previously held by the IDF. Implicitly, one of the motivations behind the operational concept for victory was the identification of relevancy gaps in the IDF’s strategy and capabilities: “Our military power requires significant adaptations given the fundamental changes in our enemies” (ibid., p. 7).

Intelligence superiority, as previously mentioned, is explicitly referenced in the operational concept for victory. This primarily concerns operational-tactical intelligence aimed at enabling precise and lethal force employment. Accordingly, intelligence is seen as a critical component at the operational level. However, at least publicly, intelligence in general and early warning in particular are not portrayed as tools for identifying potential relevancy gaps related to the core assumptions of the concept, nor as instruments for the prospective examination of its underlying premises.

A similar approach to intelligence is reflected in the way Herzl Halevi, later IDF Chief of General Staff, discussed the issue of “multidimensional defense” during his tenure as commander of the IDF Southern Command, as part of the operational concept for victory then formulated by the IDF General Staff (Halevi, 2020). Halevi describes the traditional meaning of early warning: “Early warning of an enemy attack [...] can identify an attack through a sign in one of the dimensions [...] searching across all dimensions [...] can significantly increase the chances of preventing surprise” (ibid., p. 245). Halevi also refers to operational-tactical intelligence that enables the implementation of defense: “What can certainly help delay the breach of the contact line again and again is quality intelligence [...] capable of transferring the defense effort into enemy territory through the use of offensive means for disruption or interdiction” (ibid., p. 246).

Therefore, although the IDF’s public documents do not explicitly mention the terms ‘situational surprise’ and ‘fundamental surprise’, the early warning function as reflected in these documents appears to be primarily aimed at preventing situational surprises. It is thus unclear to what extent the early warning is also intended to prevent fundamental surprises, or in other words, to assess the relevance of the IDF’s underlying assumptions and doctrines regarding the strategic environment.

The Concept of “Relevancy Gaps” in the IDF

Over the past two decades, the concept of “relevancy gaps”, which also originates from the work of Zvi Lanir, has become commonplace in IDF thinking and practice within a framework of critical historical research (genealogy) (Finkel and Ortal, 2019). This approach has become part of the IDF’s operational art practice (Dado Center, 2016). Relevancy gaps point to a profound misalignment between the way organizations perceive and describe reality and reality itself. In addition, Lanir argues that relevancy gaps lead to “broad and multi-dimensional blindness to essential processes and events in reality... This blindness accounts for the severity of the conceptual collapse in the face of a surprising event. Therefore, the roots of a fundamental surprise must be sought well before the surprising event occurs” (Finkel and Ortal, 2019, p. 265).

Accordingly, in recent years, the IDF has adopted the approach that assumptions and conceptions must be critically examined to identify relevancy gaps and prevent fundamental surprise. However, at least based on publicly available documents, the link between this approach and the intelligence product, process, or organization regarding early warning remains unclear. This may reflect a broader tendency to conceptualize intelligence in general - and early warning in particular - primarily in relation to situational surprise, rather than fundamental surprise.

October 2023: Fundamental Surprise and Failures in Early Warning, Deterrence, Defense, and Intelligence Superiority ⁶

Hamas's surprise attack in October 2023 does not merely reflect a failure on the part of the IDI (and the Shabak) to provide a focused tactical-operational early warning on the morning of October 7. Nor was the surprise limited to the timing and location of the assault - that is, a situational surprise. Israel's intelligence community, senior IDF leadership, and national decision-makers failed to recognize gradually emerging relevancy gaps between Israel's conception of Hamas and the actual evolution of the enemy's intentions and capabilities. Therefore, the shock experienced by Israel in October 2023 constitutes a fundamental surprise which, in many respects, echoes the strategic failure of the 1973 Yom Kippur War, exactly fifty years earlier.

Early Warning and Deterrence

In retrospect, Israel's conception regarding its ability to deter Hamas from launching a war proved to be mistaken (Horev, 2024; Lupovich, 2024). Israel appears to have assumed that the deterrent effects achieved in previous military operations against Hamas would suffice to establish punishment-based deterrence - that is, to convince Hamas that any military initiative against Israel would incur an intolerably high cost. Israel's analysis of Operation Guardian of the Walls (May 2021) as a means of reinforcing deterrence reflects this strategic conception (Shoval, 2021), which appears to have been prevalent within the Israeli defense establishment for many years (Baidatz and Adamsky, 2014).

Additionally, Israel appears to have assumed that the construction of the barrier along the Gaza border - following the disruption of Hamas's offensive tunnel network during Operation "Protective Edge" in 2014 and later reinforced by Operation "Guardian of the Walls" in 2021 - would succeed in establishing deterrence by denial. In other words, Israel assessed that it had successfully "convinced" Hamas of the low utility of using the subterranean tunnel network for raids and incursions into Israeli territory.

This deterrence policy was seemingly accompanied by Israel's assessment that Hamas could be persuaded of the benefits of pursuing a strategy of agreement. For years, Israel approved the transfer of Qatari funds into Gaza, believing these resources would benefit the civilian population rather than Hamas's military infrastructure. Similarly, Israel permitted thousands of laborers from Gaza to enter its territory, guided by the same rationale that underpinned the humanitarian aid policy.

These actions suggest that Israel believed its interests in Gaza were aligned with those of Hamas: agreement, avoiding war, and preserving civilian life in the Strip. However,

⁶ The analysis regarding the surprise attack carried out by Hamas in October 2023, as well as the intelligence assessments and operational preparations, is based on preliminary information and the IDF investigations as published to the public in February 2025 (e.g., Bergman & Rubovich, 2024; Dayan, Magen & Perry, 2024; Maniv, 2024; Kan 11, November 2023; Bar-Joseph, 2024; Zeitoun, 2025; Barnea, 2024).

these Israeli assumptions regarding Hamas - and more broadly, regarding Israel's ability to influence Hamas - were proven erroneous in October 2023.

Therefore, in October 2023, Israeli intelligence failed to provide early warning on the collapse of a central component of Israel's security doctrine: deterrence. This was a failure of strategic early warning - namely, the inability to detect changes in the strategic environment that necessitated an adjustment in Israeli strategy. The surprise generated by Hamas's offensive exposed a gap between Israeli expectations regarding reality and the way reality unfolded. The surprise attack exposed relevancy gaps in Israel's deterrence paradigm and the assumptions underpinning it. Hamas's actions fell outside the Israeli side's system of expectations.

This failure to recognize the collapse of Israeli deterrence vis-à-vis Hamas is particularly striking given that, throughout 2023, both the IDI and the Shabak had identified a broad weakening of Israel's deterrence posture - one that could potentially embolden adversaries to launch attacks. These assessments were communicated to the political echelon both in writing and orally (Limor, 2024; Eyal, 2024).

In other words, while the IDI and the Shabak did issue warnings regarding the deterioration of deterrence - and, by implication, the irrelevance of the foundational assumptions supporting it - it appears that this analysis was not specifically applied to the Hamas-Gaza context. Brigadier General Amit Sa'ar, Head of Research in the IDI during the October 2023 events, explicitly stated that he anticipated an offensive initiative "from the north," i.e., from Hizballah and the Iranian axis (Assenheim, 2025).

Early Warning and Defense

The defense concept developed by the IDF in the years leading up to October 2023 - based on a dense array of intelligence and technological sensors, combined with an above- and below-ground barrier - was likewise not designed to address the scenario that ultimately materialized: a multi-dimensional invasion (land, air, and sea) by hundreds of Hamas operatives (later joined by civilians from Gaza and militants from additional terrorist organizations) into Israeli territory, aimed at seizing control of the western Negev and carrying out the mass abduction of Israeli soldiers and civilians.

The Israeli defense establishment's response - particularly that of the IDI - to Hamas's attack plan as obtained by Israeli intelligence in 2022 ("Jericho Wall") illustrates Israel's underlying assumptions regarding Hamas's operational capabilities. Implicitly, these were also assumptions about Israel's own defensive capabilities. According to preliminary information, IDI officials assessed that Hamas's attack plan was "imaginary" - that the organization's military wing lacked the operational capacity to implement such a scenario. It can be inferred that senior IDF officials likely assumed that even if Hamas were to attempt a cross-border raid (as opposed to a large-scale invasion), the existing Israeli defense concept would be sufficient to thwart such an operation.

The collapse of Israel's defensive array also reflects an operational early warning failure: a failure to detect changes in the enemy's capabilities and mindset - changes that would require adjustments to Israel's operational concept. Here too, Hamas's operational behavior deviated from Israel's system of expectations and exposed a gap between Israeli assumptions regarding the defense of Gaza-border communities and the reality that unfolded. This serves yet another illustration of a fundamental surprise: the Hamas attack revealed relevancy gaps in Israel's defense concept and the assumptions upon which it rested.

Early Warning and Intelligence Superiority

Initial information indicates that prior to October 2023, the IDI and the Shabak assessed their ability to provide early warning of a premeditated offensive by Hamas, - including, implicitly, to prevent strategic surprise - as high.⁷ In this context, Itai Brun argued that the Israeli intelligence community's reliance on the assumption of "intelligence superiority" was one of the factors that contributed to the failure of October 2023 (IFIS, 2024). A similar conclusion emerges from investigative reporting, which found that Israeli intelligence apparatus had "become addicted" to intimate information about Hamas and operated under the assumption that Hamas's military wing would struggle to achieve strategic surprise (Bergman & Rubovich, 2024).

Consequently, IDI and Shabak not only failed to provide strategic, operational, and tactical early warning of Hamas's surprise attack but also failed to warn about the erosion of Israeli intelligence superiority. In practice, Hamas succeeded in concealing parts of its preparations for the October 7 attack from Israeli intelligence⁸ - and may have also conducted deception and disinformation in the lead-up (Ynet, 2024). Once again, a gap emerged between the assumptions about reality and the way reality unfolded, constituting a fundamental surprise for Israeli decision-makers and intelligence officials.

The issue of intelligence superiority is also related to what analyst Meir Finkel termed as a "sense of control over reality," particularly in the context of the "campaign between wars" (CBW or MABAM) (Finkel, 2024b). Finkel argues that this sense of control is based, among other things, on advanced intelligence capabilities - primarily in the digital and cyber domains - thus creating a culture which assumes that the IDF possesses intelligence, operational, and technological superiority over its adversaries. While Finkel does not explicitly analyze the relationship between this sense of control and early warning and surprise, the theoretical frameworks presented in this research allow for such a connection. From Finkel's analysis, it can be inferred that the IDF assumed the probability of strategic surprise and a premeditated offensive by the enemy that would begin with surprise was low.

Intelligence and Commanders

The information regarding the relationship between intelligence and senior commanders in the IDF and the political echelon prior to October 2023 remains preliminary and is not based on official investigative committee materials or conclusions.

Nevertheless, the available data indicates that the political echelon, senior military leadership, and Israeli intelligence agencies all shared the assessment that Hamas was deterred from initiating a war against Israel. This is illustrated by how senior figures in the political and military echelons described, over approximately two years, the contribution of Operation "Guardian of the Walls" in May 2021 to strengthening Israeli deterrence. However, on the night of October 6–7, 2023, this assessment began to unravel.

Ehud Eiran, Ofer Guterman, and David Simantov noted, providing a broad perspective of the interaction between intelligence and decision-making, that responsibility for the

⁷ In this context, a similarity can be identified with how the IDI assessed its ability to provide early warning of a surprise attack by the Arab armies prior to the Yom Kippur War (1973), partly based on the "special means" whose existence was also known to the senior political and military leadership.

⁸ Hamas did not conceal its intentions to initiate an attack against Israel. On the contrary, in the years leading up to October 2023, senior Hamas officials repeatedly stated their intention to undertake such an operation.

early warning failure in October 2023 lies with both the intelligence community and the political echelon in Israel (Eiran, Guterman and Simantov, 2024). The current research adopts this approach and argues, in the context of the IDF, that intelligence did not critically examine the fundamental assumptions upon which Israeli commanders based their assessment of Israeli deterrence strength vis-à-vis Hamas. In other words, senior command and intelligence entities failed to identify the emerging relevancy gaps in Israeli deterrence and defense perceptions regarding Hamas⁹.

Reassessing the Role of Early Warning Interim Summary

Early warning of war has been a central pillar of Israel's security doctrine since this doctrine was first formulated in the 1950s. As this doctrine prioritized the prevention of war - primarily through deterrence and decisive victory should war erupt—Israel's ability to maintain a normal routine between conflicts has depended on the availability of timely and accurate intelligence early warning. Typically, writing on early warning within the context of Israel's security doctrine focuses on the concept itself, without fully addressing its relationship to other key components of this doctrine, such as deterrence or defense.

Israeli discourse on early warning and surprise has been shaped primarily by the trauma of the 1973 Yom Kippur War. Surprise was largely understood as a failure to prepare adequately - in terms of time, space, and resources - for a sudden enemy-initiated offensive. Accordingly, early warning was perceived and implemented as an intelligence product primarily aimed at reducing situational surprise resulting from a sudden attack initiated by the enemy.

However, Kam's framework of the various dimensions of surprise, and Lanir's characterization of fundamental surprise, highlight an additional aspect - the gap revealed between the assumptions and perceptions of decision-makers and military commanders regarding the strategic environment, and the way the environment unfolds. Consequently, Kam and Lanir's writing bring to the forefront the role of intelligence and early warning in preventing fundamental surprise, rather than merely tactical or situational surprise.

In official IDF publications, early warning is primarily viewed as a product aimed at identifying the enemy's intentions and capabilities, rather than as a tool for detecting erosion in the foundational assumptions of senior commanders about the strategic environment. While the IDF has in recent years engaged in identifying "relevancy gaps" in operational concepts and plans, it remains unclear to what extent intelligence and early warning are integrated into that effort.

In this context, Hamas's surprise attack in October 2023 constituted a fundamental surprise, revealing critical relevancy gaps in the IDF's conceptual and operational assumptions. First and foremost, the surprise attack reflects a failure of the intelligence community to provide strategic, operational, and tactical early warning - that is, to identify in advance the development of enemy intentions and capabilities that would culminate in a large-scale military assault. It also reflects a failure on the part of both the intelligence community and senior military commanders to identify the ongoing collapse of Israeli deterrence vis-à-vis Hamas, as well as the emerging gaps between Israel's defensive concept and the nature of the offensive threat posed by Hamas.

⁹ This study does not address issues related to the worldviews of Israel's political echelon and their influence on intelligence assessments. For a discussion of this topic, see, for example: Stein, 2024.

Early Warning as a Tool for Preventing Fundamental Surprises and Identifying Relevancy Gaps in IDF Concepts

The study does not propose abandoning the traditional approach to early warning or its core function of preventing situational surprises. Rather, it suggests expanding the function of early warning to include the identification of emerging relevancy gaps between the IDF's prevailing perceptions and the actual developments in the strategic environment. In this view, early warning is also intended to mitigate the risk of fundamental surprises.

Early warning, in this expanded sense, involves looking at the enemy through the lens of the IDF's conceptual frameworks - and, conversely, reexamining the IDF's assumptions considering enemy behavior and environmental dynamics. Such early warning must identify which characteristics of the strategic and operational environment no longer align with the assumptions that informed Israeli policy, operational concepts, and planning. This form of early warning focuses on identifying processes rather than merely detecting the development of discrete events. It should detect shifts when they begin to emerge, and initiate a dialogue with senior commanders. Evaluating the effectiveness of Israel's early warning mechanisms should become a focal point of such dialogue, which must integrate intelligence assumptions about the strategic environment with commanders' assumptions about their ability to shape that environment.

One methodology well-suited for implementing early warning in this manner involves the critical examination of key assumptions - commonly referred to as the *Key Assumptions Check*. This method is widely used in the intelligence domain as part of the application of Structured Analytical Techniques. In this approach, intelligence analysts are required to systematically assess the foundational assumptions underpinning their research in order to mitigate bias and avoid rigid or predetermined interpretations of information (Heuer and Pherson, 2021; McGlynn, 2023; Ross, 2024).

This study proposes applying this methodology to the interaction between intelligence personnel and operational commanders. Intelligence organizations should expose and examine the commanders' assumptions about their capacity to influence the strategic environment - for example, through effective deterrence. These assumptions relate to the enemy's intentions and capabilities, as well as to the commanders' expectations regarding the likely outcomes of interaction with both the strategic environment and the adversary.

Intelligence should thus play a central role in fostering a critical, reflective, and open dialogue with senior commanders. While the primary responsibility for generating early warning remains with the intelligence organizations, senior commanders must become active participants in producing early warning aimed at preventing fundamental surprise and identifying relevancy gaps. This partnership must not devolve into groupthink, and certainly not into politicization or distortion of intelligence. On the contrary, intelligence must bring to the interaction a mindset of critical thinking, reflection, and constructive skepticism.

Conclusion

This study's renewed examination of the concept of early warning in the Israeli context - specifically within the IDF - reflects core themes found in the literature regarding the interrelationship between surprise, early warning, and deterrence.

Specifically, the study examined official and publicly available IDF documents and presented a discussion of the theoretical and conceptual foundations of the term "early warning". On this basis, the study proposed expanding the IDF's prevailing idea and practice of early warning so that early warning also supports the identification of

relevancy gaps between IDF perceptions and actual developments in the environment. In this way, early warning could help mitigate the risk of both situational and fundamental surprises - such as those experienced by Israel during the Yom Kippur War in 1973 and, fifty years later, in October 2023.

Intelligence, in a collaborative process with the IDF senior command, is required to warn of the initial emergence of relevancy gaps. The core claim of the current study is that early warning in Israel should be understood and implemented not only as a standalone concept but also in relation to the full set of components within Israel's security doctrine - such as deterrence and defense - as well as in relation to elements of IDF strategy regarding force employment and force design. This recommendation remains valid even under the assumption that Israel's security doctrine is likely to undergo change in light of the trauma of October 2023 and broader transformations in the strategic and operational environment (Finkel, 2024a; Guterman et al., 2024; Leesh, 2024).

Research Limitations

This study does not focus on the professional aspects of the intelligence failure in October 2023 and does not offer a professional investigation of those events. Additionally, although the study offers a new perspective of early warning, it does not present a comprehensive analysis of the evolution of this concept in Israel over the past decades. This study mainly discusses the performance of the IDI within the IDF, rather than on of the Israeli intelligence system at the national level.

Finally, the study carries an inherent risk of overextending the concept of early warning - potentially conflating it with the broader domain of intelligence or blurring the lines of responsibility traditionally assigned to intelligence organizations regarding early warning.

These limitations underscore the need to develop a more profound discourse on the concept of early warning within the IDF and in Israel more broadly. The present study may serve as a foundation for such a discussion.

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