

DAILY BRIEFING

The Dispatch

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MAIN STORY: US-IRAN CEASEFIRE COLLAPSE SPARKS 48-HOUR STRIKE EXCHANGE ACROSS THE GULF

- President Donald Trump declared the June 17 memorandum (a 60-day ceasefire with phased Hormuz reopening and partial US sanctions relief) "over" at the NATO summit in Ankara, branding Tehran's leadership "scum" and "sick people" hours after vowing "we're gonna hit 'em hard tonight." The break followed Iranian strikes on three tankers, the Rekabit, the Wadyan and the Cyprus Prosperity, outside the shipping corridor Iran had unilaterally designated in the strait. The US answered with roughly 90 targets Wednesday and, by CENTCOM's count, 170 sites over 48 hours by Thursday, hitting port facilities, an airport runway and missile launchers. Foreign Minister Abbas Araghchi responded on X: "We do not answer vulgarity with vulgarity, but with action: fearlessly and with great valour."
- Iran's Revolutionary Guard said it struck two US-linked bases each in Bahrain and Kuwait as the "first stage" of a "punitive response," warning other regional bases would face its "heavy fire" if Washington struck again. Air-raid sirens sounded three times over Manama as explosions rattled the capital. Kuwait's Ministry of Defense intercepted three ballistic missiles, one cruise missile and 10 drones, though falling debris injured one person. Qatar raised its security threat level for the first time since the April ceasefire and told residents to shelter in place. The barrage caused no serious American casualties or damage. Egypt condemned the strikes on Kuwait and Bahrain as a dangerous escalation and a violation of sovereignty.
- Iran fired 10 ballistic missiles at Jordan's Al-Azraq air base, which the IRGC called a US "command-and-control center in West Asia." Jordanian air defenses intercepted eight, scattering debris across several areas with no casualties or damage. Sirens sounded nationwide. The military vowed to bar any airspace violation, while Jordan's civil aviation authority said the kingdom's airspace and flight schedules were unaffected.
- Iran's Health Ministry issued its first overall casualty count from the two-day exchange: at least 14 killed and 78 wounded. Khuzestan's IRGC branch named three of its own dead, Second Lieutenant Hossein Amouri, Captain Saeed Tavakoli Zadeh and Basij member Mohsen Nejati, with funerals set for Friday in Ahvaz. US strikes destroyed the Ogtay Khan railway bridge in Golestan province, a strategic link on the rail corridor connecting Iran to China and Turkmenistan, and hit two further bridges on the Tehran-Mashhad line, suspending passenger service. CENTCOM also hit a warehouse at Bandar Abbas's Sarkhur Tahrui port, likely damaged boats and caused an oil leak at Haqani Port, and struck military and fishing infrastructure near Bushehr province, though the nuclear plant itself was not hit.

- Iranian state media reported additional explosions in Bushehr, Choghadak and Konarak overnight Thursday, but CENTCOM denied striking in the preceding hours, and Israel claimed no responsibility either. Iran's Foreign Ministry called the wider US campaign a flagrant war crime and a violation of the UN Charter and the ceasefire memorandum. UN envoy Amir Saeid Iravani wrote the Security Council holding Washington "fully and unequivocally responsible" for all consequences. Foreign Ministry spokesman Esmail Baqaei demanded NATO states be held accountable for "complicity," and parliament speaker Mohammad Bagher Ghalibaf warned Washington "will pay the cost" for breaking its commitments. IRGC Ground Force commander Mohammad Karami separately claimed forces had thwarted enemy plots in Iran's northwest and southeast.

STRATEGIC ASSESSMENT

The exchange is more likely than not to continue at this intensity through the coming days. Iran's rhetoric and its refusal to cede the Hormuz corridor indicate the regime values physical control of the strait more than avoiding renewed confrontation with Washington, while Trump has tied his credibility to punishing every Iranian strike on shipping. The tit-for-tat pattern that held after the April and June 28 exchanges, retaliation followed by a pause, has held again through two additional nights, suggesting both sides are still calibrating rather than abandoning the ceasefire framework outright. A wider war, extending to direct Israeli strikes or a full Iranian closure of the strait, remains a lower-probability outcome contingent on a strike that produces mass Iranian casualties or hits the Bushehr reactor itself. A swift return to substantive negotiations absent a mediated off-ramp is the lowest-probability near-term outcome, while a third consecutive night of Iranian strikes on Gulf bases or shipping would mark the escalation as deliberate policy.

IRAN

- Qatar, Pakistan, Turkey, Egypt and Saudi Arabia work multiple channels to prevent the memorandum's collapse after Trump declared the deal "over" and ordered two rounds of strikes on Iran. Foreign Minister Abbas Araghchi tells Pakistani military chief Asim Munir the US strikes violate the memorandum, while Pakistan's foreign ministry calls a renewed conflict "in no one's interest" and urges both sides to honor the Islamabad memorandum. Mediators assess the Hormuz attacks that triggered the escalation originated with regime elements opposing the deal. Turkish Foreign Minister Hakan Fidan calls the exchange a "miscommunication" and says the truce remains alive, as technical talks toward a nuclear deal continue despite the strikes. Iran buried Khamenei in Mashhad on Thursday. Week-long mass funeral processions had passed through Tehran, Qom, Najaf and Karbala, with his son Mostafa Khamenei leading the funeral prayer at the Imam Reza shrine. Israel shares intelligence with Washington on a new, specific Iranian plot to assassinate Trump, prompting a swap of his presidential aircraft as a security precaution. Former Pakistan Air Force deputy chief Muhammad Aryan says Israel does not want the US-Iran memorandum to succeed, warning that Trump's statements on the deal's collapse may be a negotiating tactic rather than final. Gulf analysts say Iran's strikes on Kuwait and Bahrain aim to pressure Gulf states into independent defense buildups against a Washington seen as too weak to rein in Tehran, while Gulf capitals hold to restraint.

ISRAEL

- Prime Minister Benjamin Netanyahu, Defense Minister Israel Katz, and IDF Chief of Staff Eyal Zamir declared at an Israeli Air Force pilot graduation that Israel stands ready to resume full-scale war with Iran at a moment's notice, amid the fresh US-Iran strike exchange. Zamir said the campaign against Iran "is not over," with "new plans on the drawing board" and major operations still ahead. Katz said Israel would strike again "with greater force than before" to restore air superiority, even a third strike if necessary. Netanyahu said the Iranian axis is "weaker than ever" but the campaign has not ended, and pledged Israel's reach extends from Yemen to Iran.
- Defense Minister Israel Katz rejected President Trump's Wednesday claim that Israel intends to withdraw from south Lebanon, saying Israel asked no one's permission to enter Lebanon and needs none to stay. Katz said IDF forces will remain in the self-declared security zone until Hezbollah is fully disarmed and the threat removed, framing the presence as Israel's response to two unprovoked Hezbollah attacks that Israeli forces have since crushed.
- A poll released Wednesday showed Gadi Eisenkot's Yashar party edging past Prime Minister Netanyahu's Likud for the first time, 23 seats to 22, with Naftali Bennett's Together Party third at 15.
- Netanyahu and Trump spoke by phone Thursday. They discussed continued coordination across fronts and the latest US troop movements in the Gulf, and Netanyahu flagged Turkish President Erdogan's anti-Israel rhetoric.
- German Chancellor Friedrich Merz told Netanyahu by phone that the US-Iran framework agreement is the "best chance" for regional stability, while warning against any de facto partial annexation of the West Bank.
- A US House vote to strip Israel of \$3.3 billion in annual military aid collapsed on June 30 when a bipartisan coalition blocked the procedural rule needed to bring it to the floor.
- Netanyahu's coalition and haredi parties Shas and UTJ agreed Thursday to narrow the Torah Study bill to one declarative clause, after veterans clashed with lawmakers and haredi protesters stormed Beit Lid military prison this week.
- A Rosa Luxemburg Foundation report maps a decade-long, Israel-aligned advocacy network pressuring Germany, UNRWA's largest government donor at \$116.8 million in 2025, to cut funding to the agency.
- A strike by Israeli-side crossing staff at the King Hussein Bridge cut Thursday's Palestinian-bound bus traffic to 25 of 50 scheduled buses, forcing the Karama crossing to briefly halt operations.
- President Isaac Herzog met election chief Noam Sohlberg and Shin Bet head David Zini Thursday to warn that hostile foreign and domestic actors are seeking to disrupt the integrity of Israel's upcoming election.
- The Knesset approved in first reading a Likud-sponsored bill to freeze additional Palestinian Authority clearance funds equal to whatever the PA transfers to Gaza each year, on top of the roughly \$4.6 billion already withheld.
- President Herzog declared that Israel's security bodies answer to "the sovereign, the people," not any individual, after new Shin Bet chief David Zini said he took the post to stay loyal to the elected government.

- Democrats MK Naama Lazimi demanded a criminal probe into Likud MK Nissim Vaturi for incitement after he called her “worse than Hamas” in a radio interview, warning his words put “a target on my back.”

LEBANON

- US Ambassador Michel Issa tells President Joseph Aoun, Prime Minister Nawaf Salam and Speaker Nabih Berri that a US military delegation will reach Beirut within days to coordinate Israel's withdrawal from two “pilot zones.” The July 15-16 Rome round was moved there from Washington for logistical reasons, and Lebanon is conditioning its participation on that withdrawal happening first. Aoun, preparing a Washington visit at Donald Trump's invitation, presses Issa to lock in the ceasefire and halt Israeli strikes on the southern suburbs. Hezbollah chief Naim Qassem rejects the framework outright, vowing “not a single clause of this agreement will pass” and casting it as ceding Lebanese territory. The US-brokered framework's Hezbollah-disarmament clause deepens Lebanese divisions. Hezbollah supporters are blocking roads, a Hezbollah lawmaker warned of civil war, and Kataeb's Sami Gemayel told Hezbollah “the very least you should do is shut up.” UN reporting puts hostilities-linked deaths at 4,319 and injuries at 12,203 since March 2, with 646,107 people returned home but roughly 500,000, including 37,000 in collective shelters, still displaced as of July 6. Israel's military says troops captured a Hezbollah Radwan Force militant near Bint Jbeil and destroyed two 200-meter tunnels near Majdal Zoun with firing points aimed at Israel, killing an armed man nearby last week. Deputy Prime Minister Tarek Mitri warns against minimizing this week's incursion by a small group of Israeli “Uri Tzafon” settlers into south Lebanon, noting they withdrew only on Israeli army orders. Amnesty International calls for a war-crimes investigation into three Israeli air strikes in Tyre, Nabatieh, and Erkey village between March 6 and 13 that killed 24 civilians, including 12 children, wiping out families. An Israeli drone strike kills two men near Ghandour Hospital in Nabatieh al-Fawqa, two days after a strike there killed four including a principal, as Israeli forces demolished homes in Khiam, Houla, and Had-datha. Lebanon's judiciary postpones former central bank governor Riad Salameh's hearing on the \$330 million Forry Associates transfer after he sued the presiding judge, with a separate Karim Souaid complaint hearing set for July 30. Lebanon's judiciary approved fugitive singer Fadl Shaker's release on bail. The decision spans four security cases, including the 2013 Abra clashes with the military, and clears him to leave prison after a decade in hiding. Donald Trump softened his suggestion that Syria confront Hezbollah. Meeting Ahmad al-Sharaa in Ankara, he said “they could help, we'll find out.” Analysts warn the idea revives fears of Syrian interference in Lebanon. UNIFIL says south Lebanon's security situation remains fragile despite a decline in violence since late June, as peacekeepers expand their presence and help repair damaged roads and infrastructure amid returning families. Prime Minister Nawaf Salam heads to Turkey to meet Recep Tayyip Erdogan, who offers Lebanon military and political backing, possible participation in a NATO force replacing UNIFIL, and support to revise the framework agreement.

SYRIA

- The UN Population Fund estimates 1.2 million people in Syria need urgent humanitarian assistance and protection, including 295,000 women of reproductive age.

- Syrian authorities took full custody of the cell behind the July 7 twin bombings near the Damascus hotel where French President Emmanuel Macron was staying during his visit. The bombings killed one person and wounded 36. Interior security chief Ahmad Al Dalati said preliminary investigation ties the cell to ISIS. Interior Minister Anas Khattab said simultaneous raids across four Damascus-area neighborhoods captured all its members, with identities to follow once the probe concludes. The attack came a week after a bombing at a Damascus cafe killed 10 and wounded 21.
- Analysts are weighing whether Syria's security position, still shaken by this month's twin Damascus bombings and Israel's continued occupation of southwest territory, is stable enough to sustain the diplomatic opening with Washington.
- The Organization for the Prohibition of Chemical Weapons' executive council reinstated Syria's voting rights by consensus, five years after suspending them over Assad-era chemical attacks, on a resolution Qatar sponsored with 66 co-sponsoring states.
- President Trump notified Congress of his intent to rescind Syria's 47-year state-sponsor-of-terrorism designation after talks with President Ahmed al-Sharaa in Ankara, launching a 45-day review Rubio says will unlock trade and investment.
- Syrian President Ahmed al-Sharaa met Trump on the NATO summit sidelines in Ankara, where Trump repeated his claim that al-Sharaa has "promised" to help on Hezbollah in Lebanon, calling him "great" without detailing the commitment.
- Al-Sharaa and Macron held a joint Damascus press conference. They signed Syrian-French economic and political agreements, the first visit by a Western head of state since Assad's fall, as Paris seeks a stake in Syria's reconstruction.
- Activists from the Israeli settler movement HaBashan Pioneers again crossed into IDF-held territory inside Syria and spent the night on Mount Hermon, vowing to stay until they establish a permanent civilian foothold.

PALESTINE

- Israeli strikes and gunfire killed eight Palestinians and wounded 17 in Gaza in a single day, pushing the war toll past 73,118 and the ceasefire-period toll to 1,092 killed and 3,507 wounded since October 10. A drone missile aimed at Hamas spokesman Hazem Qassem missed him but killed his bodyguard, Mohammed al-Fayoumi. A separate strike in Sabra killed Mohamed al-Wahidi, the World Cup screenings organizer, along with two child siblings and the driver. Elsewhere, a soldier shot World Central Kitchen driver Ahmad Esleem in the head at a Philadelphi corridor checkpoint, and troops blocked an ambulance reaching three-month-old Ahmad Zaid in the West Bank before he died. Trump's Board of Peace is planning a pilot "humanitarian zone" in Rafah, southern Gaza, to accommodate tens of thousands of vetted Palestinian civilians, secured by International Stabilization Force troops. The zone could serve as a starting point for the Palestinian technocratic National Committee for the Administration of Gaza (NCAG) to assume transitional governance, with the NCAG handling screening and access control and movement free for unarmed civilians. Diplomats and NGO officials have raised reservations that closed humanitarian zones of this kind may be incompatible with international humanitarian law. Palestinian Authority President Mahmoud Abbas issued a presidential decree setting November 28, 2026 as the date for Palestinian Legislative Council elections, the first since Hamas's 2006 victory over Fatah two decades ago, to be held across Gaza, the West Bank and East Jerusalem. Presidential elections are expected

in the first quarter of 2027. Abbas, 90, has governed since 2005 on a four-year mandate that expired in 2009, repeatedly postponing votes, including a 2021 parliamentary vote Israel blocked in Jerusalem. The National Commission for Palestinian Popular Action said any vote cannot be separated from the war in Gaza and settlement expansion in the West Bank. The Egyptian Red Crescent launched its 231st "Zad Al-Izza" convoy. The convoy reached Gaza carrying more than 2,320 tons of food, medical supplies and fuel for hospitals.

KEY REGIONAL EVENTS

United Arab Emirates

- Dina Esfandiary, Andreas Krieg and Trita Parsi debate whether the UAE's Israel ties, which drew Iranian fire in February, are becoming Abu Dhabi's asset or its exposed flank absent a wider Iran deal covering Lebanon.

Qatar

- Qatar's Emiri Air Force flew F-15QA fighters over a live-fire demonstration during the CENTCOM-area Ferocious Falcon exercise, newly released Pentagon archive imagery shows.

Saudi Arabia

- Saudi Ambassador to Washington Princess Reema bint Bandar met US Secretary of State Marco Rubio on Thursday, saying the two held productive talks on regional developments and the countries' partnership, with plans to continue close cooperation across shared priorities.
- Brig. Gen. Fahd Al Shahrani commands Saudi Task Force 800, deployed opposite Yemen's Hajjah Governorate near Midi to back the Yemeni army's Fifth Military Region and host Sudanese forces.
- Saudi Defense Minister Prince Khalid bin Salman met Canadian counterpart David McGuinty on bilateral defense cooperation, as visiting PM Mark Carney signed three Jeddah memoranda covering energy, coordination and AI investment with the Kingdom.

Kuwait

- UAE President Sheikh Mohamed bin Zayed arrived in Kuwait hours after its forces intercepted three ballistic missiles, a cruise missile and 10 drones from Iran. He met Emir Sheikh Mishal Al-Ahmad to discuss stability.

Iraq

- Iraqi Prime Minister Ali Al-Zaidi says Baghdad will not leave OPEC but is pressing for a fairer production quota within the group, after Iraq had considered exiting over output caps. Ahead of a Washington visit this month, Al-Zaidi says Iraq will announce a political and economic partnership with the United States. Baghdad, which balances ties to both Iran and Washington, is working to build "a state of rapprochement" between the two adversaries, he says.
- The United States has resumed cash shipments to Iraq after suspending them this year to pressure

Baghdad over Iran-backed armed groups, a move Baghdad calls positive ahead of PM Ali Al-Zaidi's Washington visit this month.

Yemen

- Houthi leader Abdulmalik al-Houthi is set to mark Imam Zayd's martyrdom with a speech casting Saudi Arabia as his movement's modern adversary, as pro- and anti-Houthi tribal mobilizations both intensify across Yemen on day 76.
- A Houthi Rajoum multirotor drone shot down in Hajjah shows an indigenous fiberglass airframe configured to drop mortar shells, with mismatched paint, taped patches and a fuselage hole pointing to repeated field repairs.
- Yemen's prisoner exchange advanced as a committee began verifying the fate of long-disappeared Islah official Mohammed Qahtan in Sanaa, while Radfan tribes gave a 24-hour ultimatum to exclude Thabet Jawas's convicted assassins from the swap.
- Yemen's Coast Guard, under Maj. Gen. Khalid Al-Qamali, completed a UN-backed boarding and seizure course in Aden with 15 personnel, photographed carrying Saudi-supplied G3 rifles that underscore continued Saudi arming of Yemeni forces.

Turkey

- Turkish Interior Minister Mustafa Ciftci says 219 PKK fighters have surrendered since the group's May 2025 dissolution, 134 of them this year, as Ankara has also removed 2,763 security checkpoints across the southeast.

KEY INTERNATIONAL EVENTS

- Recep Tayyip Erdogan dismissed Israeli and Greek objections to a potential US sale of F-35 fighter jets to Turkey as having "no place in my world," after Ankara branded Benjamin Netanyahu's concerns a "disinformation campaign." Netanyahu called Donald Trump to warn that Erdogan's anti-Israel rhetoric had turned "dangerous." Trump said he had not decided on the sale despite lifting sanctions tied to Turkey's S-400 purchase. He said he was "very disappointed" with NATO's response to his war with Iran, calling it a loyalty test, before privately telling the summit the US wants to "remain" in the alliance. Allies and defense firms touted over \$50 billion in new procurement deals.
- Donald Trump said Vladimir Putin and Volodymyr Zelensky both want the Ukraine war "settled," but the Kremlin rejected Washington's view that Kyiv's strikes on Russian energy sites would help end it.
- Russian strikes killed at least 265 Ukrainian civilians and injured 1,816 in June, the UN said, the highest combined monthly casualty toll since the war's opening months in 2022.
- Volodymyr Zelensky said a Russian strike on an ammunition warehouse in Vyshneve, near Kyiv, killed 10 people and damaged hundreds of houses, prompting a criminal case against the depot's state operator.
- Andy Burnham, tipped to become Britain's next prime minister, apologized for Labour's "too slow"

initial response to Israel's Gaza campaign and pledged new sanctions and a possible ban on settlement-goods trade.

- Graham Platner suspended his Senate run after a rape allegation. The anti-AIPAC Democratic nominee in Maine, whose campaign was already dogged by a Nazi-tattoo scandal, denied the move was an admission of guilt.

MARKETS

- Tanker traffic through the Strait of Hormuz neared a standstill. Only two vessels transited Thursday morning, as shippers increasingly switch off AIS tracking after the renewed US-Iran strikes.
- Brent crude jumped over 5 percent to \$78.02 a barrel, briefly topping \$80, WTI rose near \$74, and Gulf and Asian stocks slid on the Iran-US escalation.
- The war's supply shock is speeding investment in Hormuz-bypass infrastructure, with the UAE doubling pipeline capacity from 1.5 million to 3 million barrels a day by 2027.

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