

DAILY BRIEFING

The Dispatch

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MAIN STORY: WASHINGTON SETS A SATURDAY DEADLINE FOR IRAN TO RENOUNCE HORMUZ ATTACKS

- US Central Command struck roughly 90 targets across Iran early Thursday, part of more than 170 hit over two days, after the Islamic Revolutionary Guard Corps (IRGC) fired on at least three merchant vessels in the Strait of Hormuz. Iran's Health Ministry issued a first casualty count of at least 14 killed and 78 wounded. Tehran retaliated against Bahrain, Kuwait, Qatar and Jordan, with sirens sounding at least twice in Bahrain, home to the US Navy's 5th Fleet, and the three Gulf states reported no damage. The strikes hit IRGC coastal radars, anti-ship missile positions and air-defense systems, under a stated US aim to degrade Iran's ability to threaten navigation.
- Unclaimed airstrikes hit southern Iran early Friday, striking military headquarters in Bushehr province and the port city of Konarak just as Iran buried the late Supreme Leader Ali Khamenei. Washington denied carrying them out, and Tehran did not directly assign blame, though one lawmaker warned the United Arab Emirates against providing support to the US campaign. The strikes sharpened the open question of who else is targeting Iran during the war.
- Trump declared on Truth Social that the ceasefire is "over" while agreeing to continue talks, writing that Iran "has asked us to continue talks" but that Washington had told Tehran "in no uncertain terms" the deal was finished. Iran disputed the account, saying it had not requested talks but agreed to host a Qatari mediator. US officials reaffirmed that technical nuclear negotiations continue and remain "performance-based," calling the strikes on vessels "acts of terrorism" and Iran's conduct "failed performance at an unacceptable level." Top negotiator Mohammad Bagher Ghalibaf said the conflict would not end with Tehran's surrender.
- Washington gave Iran until Saturday to publicly declare the Strait of Hormuz open to all shipping, pledge no transit fees, and stop firing on commercial vessels, a message passed both directly and through regional mediators. US officials expect Iran to state the position at Foreign Minister Abbas Araghchi's meeting with Oman's Sayyid Badr al-Busaidi in Muscat. They said Iranian negotiators privately conceded that a "rogue" radical faction opened fire on ships to regain bargaining room after Oman opened a southern transit channel, and warned of a "not good" outcome for Iran absent the statement.
- Qatar flew a government delegation to Tehran on Friday, then onward to Mashhad to meet Araghchi, a push to consolidate Doha's mediating role after the week's exchanges. Egyptian and Qatari foreign ministers urged both sides to return to the table and implement the memorandum, including freedom of navigation in Hormuz. Qatari negotiators met Iranian officials in coordination with Washington to set conditions for a broader round, even as Iran has continued to pressure

Qatar while Doha mediates.

- Trump briefed Netanyahu by phone on American moves in the Gulf and the strikes on Iran, with Israel not expected to join this round of fighting though the military says it stands ready. Netanyahu urged Trump against selling F-35 jets to Turkey, raised Erdogan's statements against Israel's existence, and pressed the need for security zones along Israel's borders. No leaders' meeting is planned.

STRATEGIC ASSESSMENT

The exchange has most likely peaked for the moment, with both sides signaling they want the memorandum preserved even as Trump keeps the "over" framing as pressure. The dispute remains unresolved at its root, because the memorandum never specified how Iran must guarantee safe transit, and Tehran's claim to control Hormuz and levy fees collides with Washington's demand for an open strait. A durable de-escalation is likely only if Iran issues the public Hormuz statement Washington set for Saturday, and absent it another strike cycle becomes probable, since each of the week's exchanges followed an attack on shipping. Turkey's foreign minister reads the clashes as miscommunication over transit rules rather than intent, consistent with the judgment that neither capital seeks a full war. The Saturday meeting in Muscat is the next observable, where an Araghchi declaration on open navigation would confirm the truce holds and continued fire on vessels would break it.

IRAN

- Saeed Jalili, the newly named representative of supreme leader Mojtaba Khamenei to the Supreme National Security Council, emerged as the regime's public voice at Mashhad Friday prayers, publicly warning President Pezeshkian's government against pursuing diplomacy with Washington. Mojtaba himself stayed hidden through his father's burial, sending not even a written message: installed by the IRGC, he suffered facial disfigurement in the February strike, and his absence has fed speculation over his health and a possible power struggle with parliament speaker Ghalibaf. Reformist-leaning outlets warned that ordinary Iranians would pay the price of miscalculated slogans, while hardline media pressed for wider retaliation against US interests and regional energy routes.
- Iran's leadership split publicly over the US track, President Pezeshkian stressing adherence to commitments for peace while parliament speaker Ghalibaf and a senior cleric insisted the memorandum rests on reciprocal commitments, not trust in Washington.
- Iran resumed construction and hardening work at the deeply buried Kuh-e Tabar nuclear site and repaired bomb-damaged facilities at Parchin, including the Talkan-2 explosives site and several missile sites. The work would breach the June 17 memorandum's commitment to freeze the program at its status quo. The IAEA has lost continuity of knowledge across all of Iran's declared nuclear facilities since the February strikes. It cannot account for centrifuges, heavy water, or uranium ore concentrate. Russia's Rosatom returned its first six employees to the Bushehr power plant, which it is expanding, after evacuating hundreds at the war's outset.
- Foreign Minister Abbas Araghchi, who has run Iran's shuttle diplomacy through the crisis, travels to Oman on Saturday to negotiate mechanisms for safe passage through the Strait of Hormuz under

Article 5 of the Islamabad memorandum, following talks with Qatari and Pakistani mediators in Doha. Muscat, the strait's only other littoral state, has drafted a transit framework modeled on the Strait of Malacca with British lawyers and offered to send legal experts to Tehran. Europe is weighing proposals to permit navigational fees so long as they stay non-compulsory and UN-backed, though Britain's David Lammy called mandatory tolls disastrous. Qatar and Pakistan are pressing to revive nuclear talks and avert full-scale war.

- President Trump said he left standing orders to bomb Iran "at levels that they've never seen before," with 1,000 missiles "locked and loaded," should Tehran assassinate him, as a state-amplified "Kill Trump" campaign spread across Iran.
- Iran's security council secretary Mohammad Bagher Zolghadr warned that any attack on Iranian infrastructure would draw retaliation and that Israel "will not be safe," after Tehran accused Washington of striking civilian bridges and rail links.
- The US Treasury sanctioned Iranian financier Ali Ansari, a Dubai-based "key financier" for supreme leader Mojtaba Khamenei accused of embezzling billions in public funds into an overseas property empire spanning Germany, Britain, Spain, and the UAE.
- Families gathered at Iran's largest cemetery to mourn relatives killed in January's mass protests, one father defying arrest to tell mourners "this regime will not go back to what it was."

ISRAEL

- Israel pressed the White House for approval to strike Iran again, telling US officials it stands ready to join any future American attack after the renewed exchange of fire. Israel simultaneously handed Washington intelligence on a fresh Iranian plot to assassinate Trump, which US agencies had only partially detected and have not independently verified. US officials read the transmission as Netanyahu's government pushing to keep Trump bombing Iran. Relations between the two leaders are fraying over the war. Israel's own posture holds the current confrontation stays limited to the United States and Iran.
- Israel froze all military operations it classifies as "sensitive" in south Lebanon at Washington's request, instructions that stand until further notice pending the trajectory of the US-Iran escalation and the Lebanon talks. US officials, fearing an Israeli operation would widen the regional war, urged restraint even as Israel remains ready to exploit any Iranian attack on it to strike broadly inside Iran. Israel expects to begin pulling forces from the pilot zones under the June 26 framework this week, starting with Zawtar al-Gharbiyeh and Froun, with the withdrawal sequenced ahead of a new Israel-Lebanon round in Rome.
- Gadi Eisenkot's Yashar overtook Netanyahu's Likud 22 seats to 21 in a new poll as the opposition bloc neared 61, while Netanyahu raced coalition bills through the Knesset, reshaped the Likud list, and hinted at an unnamed successor.
- Border Police raided a home in Yarka, a Druze village in the north, seizing a Carlo submachine gun, a gas grenade, and ammunition, and arrested a 22-year-old resident.
- Israel's tax authority granted residents of 64 West Bank settlements tax benefits from next month, retroactive to January, under a Religious Zionist Party bill costing an estimated 130 million shekels and drawn to cover settlements east of the separation barrier.

- Volkswagen's Qatari sovereign-wealth investors, the automaker's third-largest shareholder, vetoed management's plan to manufacture missile components and military vehicles for Israel's state-owned Rafael at the Osnabruck plant.
- Spain's National Court opened a probe into Israeli military Chief of Staff Eyal Zamir and Navy Commander Ram Rothberg over the October 1 interception of the Global Sumud flotilla, limiting it to incidents involving Spanish-flagged vessels boarded in international waters.

LEBANON

- An Israeli drone killed a man riding a motorcycle on the Douha road near Kfar Rumman and critically wounded another struck in his car nearby. The military said it hit a Hezbollah operative near an underground shaft on the Ali Taher ridge above Nabatieh and a second man in a vehicle. Golani Brigade troops in the security zone destroyed weapons depots holding launchers, machine guns, explosives and missiles, plus tunnels at Majdel Zoun, and strikes damaged historic sites including the UNESCO city of Tyre. An estimated 30 to 50 IRGC and Lebanese fighters remain trapped inside the Ali Taher command base, resupply attempts struck and failed. A captured Radwan Force militant was transferred to Israel for questioning.
- A US military delegation from CENTCOM arrived in Beirut to coordinate ground implementation of the memorandum, meeting army command ahead of the sixth negotiating round in Rome on July 14 and 15. Ambassador Michel Issa said avoiding a security vacuum on the Israeli withdrawal is essential and that the round continues what was agreed in Washington. Rome will address Israeli demands to form joint committees on political affairs, security, and good-neighborly relations, with Lebanon's delegation under Simon Karam expanded to add financial and legal experts. Beirut conditions its participation on an Israeli withdrawal from two pilot zones first. Aoun, due at the White House July 21, said he is counting on Trump to end the war.
- Lebanese Forces leader Samir Geagea, after meeting Aoun in Baabda, insisted the state alone decides national questions, including Hezbollah's weapons, even unilaterally, and that Lebanon needs a single army. He backed continuing the memorandum despite reservations and dismissed the Islamabad track as serving Iranian and US interests, not Lebanon. Aoun told the delegation he will not back down from the decision to negotiate. He said he will tell Trump that Hezbollah's weapons must be handled within Lebanon, not from abroad, calling the group heavily weakened and IRGC-directed. He believes the army can execute the cabinet's disarmament decision without a new decree and will not submit the framework to cabinet.
- Deputy Prime Minister Tarek Mitri told a visiting Iranian delegation Lebanon intends to extend state control over all its territory, as a dispute loomed over renewing the expiring residency of Iran's persona-non-grata ambassador Chibani.
- Khawaja issued a clarifying statement amid controversy over lawsuits filed by Banque du Liban.

SYRIA

- Syrian Internal Security forces uncovered a hidden explosives cache tied to the cell behind the July 7 Damascus bombings, seizing several devices prepared for a planned attack series and defusing them, a day after arresting the full cell. Brig. Gen. Ahmad al-Dalati, Internal Security commander for the Damascus countryside, said preliminary investigations link the group to Islamic State, with surveillance footage identifying the first suspect and leading to the rest. Security forces separately dismantled Islamic State cells in the south and detained a prominent leader tied to assassinations and financing. The two blasts near Macron's hotel wounded 18.
- Gulf and Arab governments welcomed Washington's move to begin lifting Syria's designation as a state sponsor of terrorism, with GCC Secretary-General Jassem al-Budaiwi and Arab Parliament Speaker Mohammed al-Yamahi framing it as a step toward reconstruction and Syria's return to its regional role. The Organization for the Prohibition of Chemical Weapons reinstated Syria's voting rights Thursday, five years after their 2021 suspension, and approved destroying part of the newly declared stockpile at Al Qutayfah, 37 km north of Damascus, including nerve-agent material. Flydubai will resume service after a 14-year halt, launching daily direct flights to Aleppo International Airport on July 20, its second Syrian destination after Damascus.
- France returned 23 Syrian antiquities, including a mosaic that once adorned the Umayyad Mosque, aboard Macron's aircraft during his Damascus visit, as Paris positions itself as the EU's key interlocutor backing Syrian reconstruction and banking recovery.
- Trump again claimed interim President Ahmad al-Sharaa promised to help on Hezbollah, saying "yeah he did" and praising him for unifying Syria while declining to detail the commitment.
- Syrian returns are accelerating, with roughly 1,000 leaving Turkey daily after schools closed and 710,000 back since Assad's fall, and 581,409 crossings from Lebanon since the March 2 escalation.

PALESTINE

- Trump's Board of Peace saw its planned 20,000-member International Stabilization Force collapse to an initial 10 to 20 personnel, as the first Moroccan contingent slipped months past its June target, Indonesia suspended participation, and only four countries stayed committed. In parallel, the board advanced its pilot Rafah "humanitarian zone" for tens of thousands of vetted civilians, screened by the NCAG technocratic committee, though no construction has begun. The gap undercuts Washington's day-after design, which the force was meant to secure against a Hamas military resurgence. Israeli forces now control over 60 percent of Gaza.
- Israeli strikes killed 12 across Gaza despite the October truce, including senior Hamas commanders, wounded three Kamal Adwan Hospital workers, killed aid official Mohamed al-Wahidi, and narrowly missed Hamas spokesman Hazem Qassem, killing his bodyguard.
- Thousands of Gaza's disappeared risk never being identified, chickenpox and skin infections surged past 18,000 in a week, and Israel defended detaining Kamal Adwan director Hussam Abu Safiya as lawful.

- Israeli settlers attacked a Palestinian family in Hawara south of Hebron, injuring Ibrahim al-Jabour and six relatives, while settlers demolished the Yanoun elementary school east of Nablus in a depopulated village.
- Israeli forces barred Jerusalem Mufti Muhammad Hussein from Al-Aqsa for one week, detaining him after Friday prayers, prompting Jerusalem groups to call for mass mobilization at the compound.
- Palestinian President Mahmoud Abbas decreed legislative elections for November 28, the first in 20 years, though Fatah divisions, a possible Hamas exclusion, and an Israeli veto leave the vote far from guaranteed.

KEY REGIONAL EVENTS

Saudi Arabia

- Saudi Crown Prince Mohammed bin Salman and Trump reviewed regional security, maritime navigation, and the ongoing US-Iran contacts in a phone call, with Foreign Minister Faisal bin Farhan holding a parallel call with Rubio.

Yemen

- Yemen's internationally recognized government and the Houthis postponed their prisoner exchange, some 1,600 detainees, to August, each blaming the other: government negotiator Hadi Hajj said the Houthis refused to execute on the agreed date, while Houthi prisoner-committee chief Abdulqader al-Murtada faulted the other side for withholding its remaining captives. The Houthis held a Sana'a funeral for Major Adnan al-Dhanabi, killed in western-coast fighting, alongside officials who died of unrelated causes. Political Bureau member Mohammed al-Bukhaiti, in a Tehran interview during Khamenei's mourning ceremonies, put Riyadh at the center of the movement's next war while courting its Yemeni tribal allies. Anti-Houthi tribes named Sheikh Mardi al-Marzouqi to lead the al-Rayyan Dignity Encampment, replacing its founder.
- Yemen's Presidential Leadership Council rejected Iran's request, routed through the Saudi-led coalition, to fly Mahan Air from Tehran to Sana'a to retrieve Houthi members, insisting only national carrier Yemenia operate such flights.

Turkey

- Turkish Foreign Minister Hakan Fidan called Iran "mature enough" for a new security understanding and said the US-Iran truce remains alive.

Egypt

- A senior Israeli military delegation spent two days in Cairo consulting Egyptian officials on the next phase in Gaza and Hamas disarmament, with Israel now viewing Egyptian mediation as more effective than Qatar's or Türkiye's.

Bahrain

- Residents of Bahrain and Kuwait woke to air-raid sirens and explosions as renewed Iranian strikes on the two states, which Tehran said targeted US assets, dashed hopes of a return to normalcy.

KEY INTERNATIONAL EVENTS

- Four US senators, Republicans Lindsey Graham and Roger Wicker and Democrats Richard Blumenthal and Jeanne Shaheen, reached agreement with Trump on updated legislation imposing tariffs up to 500% on countries that buy Russian oil and gas.
- France will host at least 25 heads of state and government Monday in Paris, including Zelensky and NATO chief Mark Rutte, for a “Coalition of the Willing” meeting on Ukraine, with Moldova and North Macedonia newly joining.

MARKETS

- Oil prices eased Friday. Weekly gains held at 4 to 5 percent after daily tanker transits through the Strait of Hormuz slowed to six vessels by 14:30 GMT Thursday, down from 21 on Wednesday. June global supply rose 4.1 million bpd yet stayed 9.4 million bpd below pre-war levels, with warnings of tight diesel and gasoline as vessels dark their transponders or route north near Iranian waters.
- Ukrainian drones struck the Ilsky refinery in Krasnodar, oil-storage sites, and the Taganrog port terminal in Russia's south, setting two tankers ablaze in the Sea of Azov and forcing evacuations. Kyiv's campaign against energy infrastructure sustains a nationwide Russian fuel shortage with gasoline rationing.
- China imposed an immediate temporary ban on helium exports to protect its chipmaking supply as the Iran war tightened the global market. It produces under 15 percent of its own helium and imports much from Qatar, which supplies roughly a third of the world's total.

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