

DAILY BRIEFING

The Dispatch

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MAIN STORY: TRUMP REIMPOSES IRAN BLOCKADE, DECLARES US 'GUARDIAN OF THE STRAIT OF HORMUZ'

- President Donald Trump declared the US the “guardian of the Strait of Hormuz” on Monday, reinstating a naval blockade on Iranian shipping and announcing a 20 percent toll on all cargo transiting the waterway to fund its protection, effective 20:00 GMT Tuesday. He said the US is “taking over” the strait after accusing Iranian negotiators of reneging on an 11-hour deal reached over the weekend, and insisted the passage will “remain open, with or without Iran.”
- Iran rejected the claim outright. Foreign Minister Abbas Araghchi said Iran has “always been, and will forever remain,” the strait’s guardian and mocked the 20 percent toll as excessive. Iran’s Khatam al-Anbiya joint military command warned it “will not allow” US interference in managing the waterway and cautioned Gulf states that cooperating with Washington amounts to war against Iran. The Revolutionary Guards vowed to “compel foreign powers and their allies to submit to the will of the Iranian nation.”
- Iran struck the UAE-flagged tankers Mombasa and Al Bahiyah with two cruise missiles in the strait’s southern lane inside Omani territorial waters, killing one Indian crew member and wounding eight others, four critically. Fires broke out and crews brought them under control. The UAE Ministry of Defence condemned the strike as “brazen” and a clear breach of international law, saying it retained “its full right to respond to this escalation,” raising the prospect of direct UAE-Iran fighting. IRGC naval forces separately disabled two supertankers they said had ignored repeated warnings and switched off navigation systems while crossing the mined route.
- The US military carried out a third consecutive night of strikes on Iran, hitting air defense systems, coastal radars, missile and drone sites, small boats and a submarine and ship maintenance facility with precision munitions and mine-laden drones. Trump threatened to hit the Pickaxe Mountain nuclear site “relatively soon.” Iran’s Revolutionary Guards retaliated by striking US facilities in Bahrain, Kuwait and Jordan’s Prince Hassan air base and destroying radar systems in Oman, while satellite imagery showed damage to a warehouse at Bahrain’s Fifth Fleet base and buildings at Qatar’s Al Udeid Air Base. Sirens sounded across Bahrain for a third time, while Jordan intercepted four Iranian missiles and Kuwait’s forces engaged hostile aerial targets.
- Strait traffic collapsed to six vessels on Sunday, the lowest single-day total in five weeks, as Iran fired warning shots Monday at two ships attempting what it called an illegal crossing. Tankers still transiting included the VLCC Humanity carrying 2 million barrels of Iranian crude and the Capetan Andreas hauling 500,000 barrels of Kuwaiti products, with most vessels switching off transponders and no LNG carriers entering the strait at all.

- Qatari, Iranian and Omani officials met in Muscat to discuss fully reopening the strait's international-waters "median lane," while Iran said it kept talking with mediators Qatar, Pakistan and Oman to "prevent escalation" and notified the UN's International Maritime Organization of a temporary safe corridor. Germany, France and Britain jointly condemned Iran's attacks on shipping and regional states and called for restoring the ceasefire and resuming negotiations.

STRATEGIC ASSESSMENT

The zero-sum contest for Hormuz control is likely to keep escalating rather than de-escalate absent a diplomatic circuit-breaker, since Washington and Tehran have now both publicly claimed sole "guardian" status over the same waterway, a position neither can concede without a domestic loss of face. The UAE casualty toll, the first foreign-national deaths from an Iranian strike since the war resumed, raises the likelihood Abu Dhabi enters the fighting directly if Iran does not pull back, which would widen the conflict beyond the US-Iran axis. Trump's toll scheme is operationally difficult to enforce without a large naval presence, a gap outside analysts have already flagged, suggesting the announcement functions for now more as a negotiating lever than an executable policy. The parallel Muscat and Qatari-mediated channels, still active despite three nights of strikes, indicate neither side has fully abandoned the Islamabad memorandum framework. UAE retaliation for the tanker strike is the sharper tripwire, with the blockade's scheduled 20:00 GMT Tuesday start the second, and either would signal whether this cycle tips into open regional war.

IRAN

- Former Mossad chief David Barnea met ex-president Mahmoud Ahmadinejad in Budapest in 2024 and 2025, the meetings disguised as academic-conference invitations at Ludovika University, part of a multi-year Israeli effort to groom him as Iran's next leader in the event of regime change. The plan collapsed. Four senior Iranian officials say Ahmadinejad is now under house arrest by IRGC intelligence after Tehran uncovered the contacts, and he last appeared in public flanked by guards at Ali Khamenei's funeral. Trump claimed Iran's military leadership has been wiped out and that Khamenei's son and successor Mojtaba is "90% gone" from wounds suffered in the strike that killed his father. UK Home Secretary Shabana Mahmood proscribed Iran's Islamic Revolutionary Guard Corps as a terrorist organization, alongside the Islamic Movement of the Companions of the Right (IMCR) and Russia's GRU volunteer corps. Support for any of the three is now a criminal offense punishable by up to 14 years in prison. Security Minister Angela Eagle said IMCR, which claimed seven attacks on UK Jewish sites including a March 23 arson on Hatzola ambulances in Golders Green, was directed by IRGC Quds Force operatives "almost certainly" behind the group's attacks across Europe. Iran has intensified persecution of its Baha'i minority since January, imprisoning dozens and accusing some of spying for Israel, with detainees reporting electric shocks, mock hangings, and forced confessions. A bot campaign traced to Iran is flooding Nova festival massacre survivors with abuse and propaganda, calling for their deaths and pushing conspiracy theories questioning the October 7 attack. Nazanin Zaghari-Ratcliffe condemned Iran's July 1 re-arrest of environmentalists Houman Jokar and Sepideh Kashani, previously jailed on discredited espionage charges over wildlife camera traps, as "unimaginably cruel." Iran's Foreign Ministry said ending impunity for Ali Khamenei's assassination is a recognized international-law principle, days after successor Mojtaba vowed revenge and Trump threatened to "completely decimate"

Iran over any attempt on his life. More than 20 Democratic senators led by Kirsten Gillibrand demanded the Pentagon release within a week its investigation into the February 28 strike that killed over 175 girls and teachers at an Iranian school. President Masoud Pezeshkian told visiting Russian Energy Minister Sergei Tsivilyov that Iran is ready to remove obstacles to implementing its strategic agreements with Moscow.

ISRAEL

- The Knesset passed the Basic Law: Torah Study 63-52 Monday, declaring Torah study a foundational value in a move haredi parties hope will shield yeshiva students from future High Court challenges to draft exemptions. Netanyahu did not vote. Likud's Yuli Edelstein and Dan Illouz voted against. Haredi factions escalated further, demanding the coalition freeze all Knesset votes until a "deserters pardon law" reaches the plenum, with Finance Committee chair Moshe Gafni halting budget transfers over Smotrich. Separately, Likud's Constitution Committee weighs letting Netanyahu set the party's top list slots ahead of October elections amid opposition, as a poll finds 46% of Israelis want more pressure to draft haredi men. Ben-Gvir's Ministry of National Security approved a 4 million shekel transfer, via tender exemption, to Ahvat Gilad, a settler organization that France, the UK, Canada, Norway, Australia and New Zealand sanctioned last month for financing violence-linked West Bank outposts. The transfer funds an 18-month (extendable) youth mentor network in the outposts. Separately, IDF Central Command chief Avi Bluth signed a decree Sunday upgrading Givat Ze'ev, a 35,000-resident settlement five kilometers northwest of Jerusalem, from local council to official Israeli city status, drawing praise from Finance Minister Smotrich and Mayor Yossi Asaraff. Israel's prison system inflicts routine, barely concealed torture and death on detainees, an investigation finds, citing Rakefet, an underground facility Ben-Gvir reopened in late 2023 where Palestinian detainees never see daylight, and describing daily beatings and hammer strikes elsewhere. Roughly 3,500 Palestinians remain held under indefinitely renewable six-month administrative detention orders, nearly 200 of them children. Netanyahu ordered the Shin Bet to investigate the leak of Operation Roaring Lion's start date to a media outlet, despite Shin Bet chief David Zini warning the leak's source is unlikely ever to be identified. The IDF detained several Israeli civilians in the Golan Heights Monday for illegally attempting to cross into Syria, the latest incident after roughly 100 "HaBashan Pioneers" settlement activists crossed en masse on July 5. Israeli police arrested 14 suspects, an Israeli and Palestinians, in a joint Border Police-Shin Bet-tax authority sting that uncovered a smuggling network moving dual-use materials worth millions of shekels for West Bank explosive devices.

LEBANON

- President Joseph Aoun demanded a full Israeli withdrawal and a written pledge that Israel has no further designs on Lebanon ahead of the sixth Rome round (Tuesday-Wednesday), vowing to press Trump on his Washington visit to force Israeli compliance with the framework agreement. A US military delegation met Lebanese Army command in Beirut to plan the first pilot-zone handover. The army will begin withdrawing next week after Washington ordered a freeze on "sensitive" operations. Israeli Ambassador Yechiel Leiter countered that the IDF will pull out only if Hezbollah is removed from the pilot zones, and Israeli officials are delaying withdrawal until after October's

parliamentary elections. Some 646,107 of the 1.2 million Lebanese displaced by the war have returned home, the International Organization for Migration's latest count shows (Lebanon's social affairs minister Haneen Sayed put 400,000 returns within the framework agreement's first 24 hours alone). Roughly half a million remain displaced. Return excludes the 64 towns and villages inside Israel's "Yellow Line" zone, still under occupation. Hezbollah MP Hussein al-Hajj Hassan called the framework an "Israeli-Israeli agreement," noting Israeli Defense Minister Yisrael Katz has said 200,000 Lebanese from destroyed southern villages will not return. He accused Aoun of committing Lebanon to disarm Hezbollah, a pledge he said no one would be able to fulfill. Speaker Nabih Berri and Hezbollah reiterated to local and international mediators that they reject the framework agreement and will not engage with all its provisions, telling Army Command that enforcing any military action on the ground by force would be extremely difficult. Berri called the deal "a thing of the past" that has "lost any significant support," claiming the vast majority of Muslims oppose it while it retains the backing of no more than half of Christians. He told Druze leader Walid Jumblat that US-Iranian communication channels remain open despite tensions, and that the Lebanese file would again become a separate agenda item. Israeli forces detonated and burned houses in Haddatha, carried out dawn explosions in Bint Jbeil, and shelled the Nabatieh-Kfartebnit area with artillery. Japan contributed \$1 million to the UN World Food Programme to provide food assistance to 59,000 vulnerable Lebanese affected by the conflict. UN agencies published fresh Lebanon situation reports, including OCHA's conflict-intensity snapshot, UNDP's weekly Tensions Pulse tracking over 127,000 IDPs still in shelters, and Q1 logistics, telecoms, and health cluster dashboards. Syrian Foreign Minister Assaad al-Shaibani, Speaker Berri, and Syrian President Ahmad al-Sharaa denied Damascus has any intention of intervening militarily against Hezbollah in Lebanon, rejecting Trump's suggestion Syria could handle the group. Kleiat airport has sat unused for decades despite existing on maps and in official texts, because Hezbollah controlled Lebanese airspace and blocked its operation. Human rights bodies criticized Lebanon's newly approved law replacing the death penalty with aggravated life imprisonment, arguing it enshrines rather than abolishes the punishment. A Lebanese American Renaissance Partnership delegation presented Aoun with plans for a Washington economic roundtable and a "Cedars Challenge" youth training program run jointly with the Lebanese Army. Syria's border authority will reopen the Dabousieh crossing with Lebanon in early September, easing pressure on the Jdeidet Yabous crossing and reviving trade via Tripoli port. Hezbollah has buried thousands more militants in the past three weeks, including ceasefire-recovered remains and morgue-held bodies, leaving the true death toll far above the reported 4,000.

SYRIA

- The Turkish navy frigate TCG Istanbul made its first port call to Syria's Latakia since the Assad regime's 2024 collapse, carrying naval forces commander Adm. Ercüment Tatlıoğlu. The visit follows Ankara's rapid rebuilding of ties with President Ahmed al-Sharaa's government. Last week that government hosted a Turkish army engineering brigade's 240-meter floating bridge over the Euphrates in Deir Az-Zour, and al-Sharaa met Recep Tayyip Erdoğan on the margins of the NATO summit in Ankara. The two countries signed a security pact in 2025 covering joint training and intelligence exchange, and Latakia, a former Assad stronghold, doubles as a Turkish strategic foothold on the Eastern Mediterranean.
- Lebanon's Internal Security Forces detained a Syrian Islamic State commander on June 30, identifying him as the group's leader for central and southern Syria, as Damascus investigates the

IS-linked cell behind the July 7 Macron-visit bombings. Separately, Turkey's MIT intelligence service captured Talib Güler ("Abdulsalam Türki") outside the country and transferred him to Turkey: Güler had entered Syria illegally in 2014 and coordinated IS activities with his brother Qasim Güler, the group's "Turkey province" chief whom MIT arrested in 2021. The arrests follow a May 23 joint Turkish-Syrian operation that detained ten Turkish IS suspects inside Syria.

- Syria's Interior Ministry confirmed the three detained suspects, Dhiya Shaker al-Qasim, Abdullah Younes al-Jbouri and Mohammed Asaad Mohammed, belong to Islamic State and are responsible for the July 7 Damascus bombings near the Tourism Ministry and the Four Seasons hotel that killed one person and wounded dozens. The ministry cited surveillance footage and confessions, and investigators are still pursuing accomplices. Separately, Suwayda security director Sleiman Abdul Baqi closed the probe into a July 12 car explosion on the Damascus-Suwayda road, finding the blast originated inside the vehicle with no sign of external gunfire. A National Guard militia member, Maimoun Talal Kahl, was killed while allegedly planting the explosive that detonated prematurely.
- FEWS NET projects Syria's food security crisis will persist into early 2027, with 5 to 5.99 million people needing humanitarian assistance between October 2026 and January 2027 despite an expected uptick in crop production.
- Secretary of State Marco Rubio notified Congress on July 8 that Syria's removal from the US terrorism-sponsor list, held since 1979, takes effect in 45 days unless lawmakers object. Objection is unlikely.

PALESTINE

- Israeli forces killed at least three Palestinians and wounded 15 more across Gaza on Monday despite the October ceasefire. A drone strike on a motorcycle in Gaza City's Tal al-Hawa neighborhood killed Osama Naim Shamlakh, 28, and wounded nine bystanders with two missiles. A separate strike on a police post near the at-Twam roundabout wounded four officers, one of whom, Thaer Ramzi Fayyad, 36, later died. Israeli aircraft also hit a displacement tent in Khan Younis's al-Mawasi area and a vehicle in az-Zawayda, while artillery shelled eastern Deir al-Balah and Gaza City. The cumulative Gaza death toll has reached 73,231. Rep. Ro Khanna escalated his row with Israel's military over his week-old detention near Khirbet Zanuta in the South Hebron hills, accusing the IDF of lying after Netanyahu disputed his account. Khanna said settlers wielding M4 rifles surrounded his van, kicked its tires and mocked his group for roughly 20 minutes before four soldiers arrived and, he said, told his translator they backed the settlers and further blocked the convoy. Israeli officials claim the area was a closed military zone, though it was not. The incident renewed scrutiny of settler violence against Americans, attacks Palestinian journalists say draw far less attention when they are the target. Israel's High Court set a July 19 deadline for petitioners in the case of detained Gaza doctor Hussam Abu Safiya, held without charge since December 2024, as roughly 50 German lawmakers publicly demanded his release. Gaza's agricultural sector has lost \$3.49 billion (\$1.90 billion direct, \$1.59 billion indirect) under the war, with over 85% damage across most subsectors, 8,700 wells destroyed, and 69,000 livestock and 2.79 million birds killed. Britain pledged £10 million to Gaza recovery and joined the EU's \$1 billion Team Gaza Initiative, as Foreign Secretary Yvette Cooper warned the plan risks being "completely de-railed" without lifted Israeli aid restrictions. Israeli prison guards shot jailed Fatah leader Marwan Barghouti, 67, in the leg with a rubber bullet at Ganot prison last week, his wife said, an incident Israel's

Prison Service denies. The UN accused Hamas of forcibly entering a Jabalia food distribution site and WFP warehouse and assaulting two truck drivers. Hamas denied obstruction, calling the incident an "official law enforcement operation." Israeli settlers assaulted 79-year-old Ibrahim Ismail al-Jabour and his family in Masafer Yatta's Hawara area, injuring and pepper-spraying several relatives including women and children. An analysis argues Trump's 20-point Gaza plan preserves Israeli pre-eminence over Palestinians' fate, requiring Hamas to surrender all claims while foreign powers supervise the Palestinian Authority. Israeli occupation authorities forced Jerusalem resident Ali Khalil Abu Tayeh to demolish his own home in Umm Tuba, sheltering seven people, under threat of a municipal demolition and an 80,000-shekel fine. A newly disclosed Hamas document reveals a September 2022 "Strategic Deception Plan" detailing the six-to-ten-hour window Sinwar sought to blunt Israel's counteroffensive, part of the same reveal covering his nuclear-attack fears. Arab League chief Nabil Fahmy sent letters to Slovenia's Toni Kaizer and the EU's Kaja Kallas urging Slovenia to reverse plans to withdraw recognition of Palestine and move its embassy to Jerusalem.

KEY REGIONAL EVENTS

Yemen

- Yemen's Saudi-backed government struck the runway at Houthi-held Sanaa airport on July 13 to block a Mahan Air flight carrying a Houthi delegation returning from Khamenei's funeral in Tehran, diverting the plane to Hodeidah. The Houthis blamed Saudi Arabia, declared their de-escalation with Riyadh over, and fired ballistic missiles and drones at Abha airport and King Khalid air base, intercepted by Saudi air defenses. They also detained an ICRC aircraft and crew in Sanaa. Trump had given Crown Prince Mohammed bin Salman advance backing for the strike. The UN Security Council held an emergency session denouncing Iran's role. Yemen's Rashad al-Alimi vowed no Iranian aircraft would return.

Iraq

- Iraqi Prime Minister Ali al-Zaidi departed for Washington on his first international trip since taking office in May, meeting President Trump July 13-18 to sign energy and trade deals. Zaidi is pursuing major US investment in Iraq's oil, gas and power sectors: talks with Chevron on upstream projects, US-backed LNG and power ventures, security guarantees for American operators in Kurdistan, and revived pipeline plans linking Iraq to Mediterranean export markets. The push follows the US-Iran war, which cut into Iraq's 3.4 million barrels-per-day of exports through the Strait of Hormuz. Washington is separately pressing Baghdad to rein in Iran-backed militias. Iraqi investigators seized nine Mosul commercial properties and three flour factories worth 69 billion dinars and recovered 375kg of gold in the corruption case against detained deputy oil minister Adnan al-Jumaili. A Munich court sentenced Iraqi former Daesh member Twana H.S. to life and his wife Asia R.A. to nine and a half years for enslaving and raping two Yazidi girls in Syria.

Qatar

- Qatar's Emir Sheikh Tamim bin Hamad Al-Thani received condolences from across the region for his father Sheikh Hamad bin Khalifa Al-Thani, who ruled 1995-2013 and died Sunday at 74.

Saudi Arabia sent a delegation led by Prince Saud bin Naif, and King Salman and Crown Prince Mohammed bin Salman called Tamim directly. UAE President Sheikh Mohamed bin Zayed, Egypt's Sisi, and Iraq's Muqtada al-Sadr also sent condolences, as did Hamas, which credited Sheikh Hamad's 2012 Gaza visit, the first by an Arab head of state after 2007, with helping break Israel's siege. Sheikh Hamad founded Al Jazeera in 1996, ending Arab states' broadcast monopoly.

UAE

- UAE President Sheikh Mohamed bin Zayed discussed the Iran war's impact on Hormuz shipping with Greek PM Kyriakos Mitsotakis by phone, as UAE envoy Maqsoud Kruse joined NATO's counter-terrorism dialogue in Brussels on July 9-10.

Egypt

- Egyptian Foreign Minister Badr Abdelatty rejected unilateral moves to redraw the Middle East, including "Greater Israel" proposals, saying any regional order must reflect consensus among regional states, not one country's vision.

Turkey

- Turkish prosecutors ordered the arrest of nearly 1,000 suspects nationwide ahead of the July 15 anniversary of the 2016 coup attempt, which Ankara blames on the movement of exiled cleric Fethullah Gulen. Justice Minister Akin Gurlek and Interior Minister Mustafa Ciftci said police sought 968 suspects tied to what Ankara calls the Fetullah Terrorist Organization (FETO). It is the latest phase of a decade-long purge that has detained hundreds of thousands across the military, judiciary, police, media and civil service since the failed coup, which killed roughly 250 people and wounded about 2,000.

KEY INTERNATIONAL EVENTS

- The European Commission this week floated an options paper framing new trade restrictions on Israeli settlement goods as a sanction, a classification Germany backs but which requires unanimous agreement among all 27 member states, handing Berlin a veto. France, the Netherlands, Sweden and Spain want the measures adopted as a trade measure needing only a qualified majority, the route the EU used to phase out Russian gas imports. EU foreign policy chief Kaja Kallas said a majority of member states back action on settlement trade, options including a full or partial import ban, stricter export licensing, or tariffs, and tasked ambassadors to advance the issue ahead of an extraordinary meeting. UN Secretary-General António Guterres urged Iran and the US to resume talks and restore free passage through the Strait of Hormuz, as Jordan's Safadi and Germany's Wadephul pressed for ceasefire adherence in a Monday call. South Carolina Governor Henry McMaster named Graham's sister, Darline Graham Nordone, to fill the late senator's Senate seat through January, as Washington and Kyiv absorb the loss of a key Trump ally. A poll finds 79 percent of Americans now expect the US-Iran war to drag on, up from 65 percent in late March, with only 37 percent approving of the strikes. Ukrainian drone strikes killed three people and wounded five in Russia's Moscow region on Monday, Russian air defenses downing 81 drones overnight, as Kyiv intensifies its campaign against Russian oil infrastructure. A Sudanese

court sentenced RSF commander Mohamed Hamdan Dagalo and 12 others to death in absentia for crimes in Darfur, as the UN warned 825,000 Sudanese children face severe malnutrition this year.

MARKETS

- Brent crude jumped as much as 9.06 percent to \$82.90 a barrel and WTI 9.05 percent to \$77.87, the highest in a month, as Trump's renewed Iran blockade announcement compounded the week-end's strikes. The dollar index climbed to 101.07, its highest level since July 8, on Fed rate-hike bets, while gold fell 1.2 percent to \$4,072.78 an ounce. Wall Street's tech shares dragged US futures lower and Asian markets slid, Seoul's Kospi down as much as nine percent to a post-April low as SK Hynix and Samsung both sank double digits. Gulf airlines held near-normal schedules despite Iran's regional strikes, though Air Astana suspended its UAE routes.

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