

DAILY BRIEFING

The Dispatch

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MAIN STORY: US RESUMES STRIKES ON IRAN, DECLARES CEASE-FIRE DEAD

- Iranian forces fire on three tankers in the Strait of Hormuz Tuesday, including the Qatari LNG carrier Al Rekayyat and a Saudi crude tanker. US Central Command answers by striking Iran, hitting more than 80 targets Wednesday and 90 more by Thursday, including air-defense systems, coastal radar, command centers, and more than 60 fast boats. Trump declares the memorandum of understanding "over" at the NATO summit in Ankara, calls Iran's leadership "scum," "sick people," and "cuckoo," and revokes the sanctions waiver on Iranian oil exports. Iran's Revolutionary Guard retaliates with missiles and drones on 85 sites in Bahrain and Kuwait, including the US Fifth Fleet headquarters and Ali Al-Salem air base. Kuwait intercepts two ballistic missiles and 13 drones.
- Iran threatens to shut the Strait of Hormuz to all maritime traffic if struck again and vows to hit "enemy targets" at a ratio of at least two to one. The Khatam al-Anbiya Central Headquarters declares the armed forces will not allow "any interference" in managing the strait. Parliament speaker Mohammad Bagher Ghalibaf accuses Washington of major MOU violations, including reinstating oil sanctions and rejecting Iran's "adjustments" to shipping lanes, and declares "the era of bullying and extortion is over." The dispute centers on whether Tehran retains coordination authority over transiting vessels or Washington establishes an alternate corridor near Oman, the sticking point that has kept a final deal stalled for three weeks.
- Trump warns Washington will respond to any Iranian attack at a "20 to 1" ratio. He claims US forces destroyed 28 Iranian boats overnight and partially struck Kharg Island, the hub for roughly 90 percent of Iran's oil exports, and threatens to seize the island or hit power stations and desalination plants "if we have to." He says Iranian officials called seeking a deal but doubts Tehran would honor one, and insists the campaign targets only Iran's nuclear program, not a broader war. Trump adds that Iran requested a funeral-related pause, that Washington agreed, and that Iran fired two missiles anyway, saying "we could have killed them" but held back. The US separately repositions refueling aircraft to the region amid Israeli reports Washington may greenlight renewed Israeli strikes on Iran.
- US cruise missiles, reportedly Tomahawks, strike two railway bridges in northern Iran for the first time since the ceasefire, including one near Aq Qala in Golestan province that links Iran to Turkmenistan. Strikes also hit port facilities at Chabahar (control tower and piers), Kuhestak, and Bandar Abbas, where a warehouse is destroyed and oil leaks emerge near Haqani port. A firefighter is killed and the airport damaged in Iranshahr, shrapnel strikes Imam Ali hospital in

Chabahar, and power is cut across parts of the city. Roughly 9,000 people remain displaced inside Iran by strike-related housing damage.

- President Joseph Aoun condemns Iran's strikes on Bahrain and Kuwait as a "blatant violation" of sovereignty and international law, voicing Lebanon's "full solidarity" with the Gulf Cooperation Council while repeating his call for "restraint and de-escalation." Jordan, Egypt, and the UAE issue similar condemnations of Tehran, and French President Emmanuel Macron says Iran's strikes on US bases breach the interim agreement even as he expects the ceasefire talks to continue. NATO chief Mark Rutte separately calls the US strikes "absolutely necessary" given what he terms Iran's violation of the truce.
- An investigation finds senior US commanders ignored repeated intelligence warnings that targeting data was outdated before approving strikes during the 12-day war. Those strikes included the bombing of an Iranian elementary school, misidentified as a military site, that killed nearly 200 people, mostly children. The findings raise new questions about the US military's targeting process even as the current round of strikes expands.

STRATEGIC ASSESSMENT

The interim MOU, already assessed as fragile given repeated Hormuz skirmishes since April, is now functionally dead. Trump's declaration that the deal is over, the revoked oil-sanctions waiver, and the threatened 20-to-1 response ratio point toward a sustained multi-day campaign rather than a one-off reprisal, contingent on whether Iranian forces keep firing on Hormuz shipping. Tehran's calibrated response, striking declared US bases rather than the sea lane itself, and Trump's same-day disclosure of Iranian outreach for a deal indicate both sides still prefer signaling to full rupture. The strait remains the load-bearing dispute: Iran's insistence on unilateral arrangements for transit collides with Washington's demand for unimpeded passage, and neither position has moved despite three weeks of parallel diplomacy. The US's expanding target set, hitting rail and port infrastructure inside Iran for the first time since the ceasefire, signals a deliberate escalation ladder, most likely aimed at forcing Tehran back to nuclear talks rather than at regime change. Watch whether Iranian forces strike another commercial vessel in the strait in the next 24 to 48 hours: that would confirm a sustained war track over a bounded punitive exchange.

IRAN

- Foreign Ministry spokesman Esmail Baqaei says Washington violated the Islamabad memorandum by contesting Iran's Hormuz safe-passage authority and striking Iran outright. Deputy Foreign Minister Gharibabadi calls the revoked oil-sanctions waiver a breach demanding "decisive" retaliation, and Parliament Speaker Ghalibaf says the "era of bullying is over." Khatam al-Anbiya Central Headquarters warns any state backing the "aggressor US military" is a legitimate target, and Navy Adm. Sayyari vows Iran's coastline will become "a hell" for invaders. Foreign Minister Araghchi says Iran "answers vulgarity with action" and consults Qatar on Hormuz, as Tehran releases first footage of Khamenei's ruined compound and Iraqi ex-PM al-Maliki says Najaf's crowds show "Iran is not alone."
- Iran's economy faces years of recovery. It has been battered by two wars in a year, sanctions, and mismanagement, and compounded by an environmental crisis of groundwater depletion, worst-

in-world Tehran air pollution, and a dried-out Lake Urmia.

- The Iraqi Popular Mobilization Forces announce that more than 2.3 million people took part in Khamenei's funeral procession in Najaf, where Ayatollah Mohammad-Taqi al-Hakim led funeral prayers over his coffin.
- Robert Malley, a former US special envoy for Iran, assesses that despite Khamenei's killing on the war's first day, the ceasefire deal now being negotiated favors Tehran.

ISRAEL

- President Donald Trump told reporters at the NATO summit in Ankara that he believes Israel will withdraw troops from south Lebanon, saying he had discussed it with Prime Minister Benjamin Netanyahu: "I think they're going to, I think they want to." He pointed to the two governments signing deals for the first time in years as evidence of improving ties. Lebanon is conditioning its attendance at the July 15-16 Rome talks on an Israeli withdrawal from two "pilot zones" in the south under last month's framework agreement, which set no withdrawal timetable. Israeli officials have vowed to hold a 10-kilometer security zone as long as Hezbollah stays armed.
- US Defense Secretary Pete Hegseth canceled a planned Israel visit to meet Prime Minister Benjamin Netanyahu and Defense Minister Israel Katz, called off as fighting resumed between Washington and Tehran.
- The EU Aviation Safety Agency lowered its risk classification for Israel from high-risk conflict zone to a medium-level advisory, letting airlines such as easyJet, Ryanair and Wizz Air decide individually whether to resume flights.
- Haredi rioters briefly breached an Israel Defense Forces base housing a military prison and courts, part of a wider unrest wave that includes ongoing protests against Jerusalem's light rail. Demonstrators burned trees and blocked traffic at the Bar-Ilan intersection Tuesday and damaged pipes set for installation on the line last week, pushing cumulative damage to the unfinished Green Line above NIS 400 million since construction began about six years ago. The vandalism has forced operator Kfir to delay the Givat Shaul-Ammunition Hill section's opening from late 2025 to 2027, leaving the HaTurim-Malha Mall stretch as the line's first to open, by late 2026, despite dozens of indictments filed against protesters.
- Shin Bet chief David Zini confirmed leaked remarks that he took the post for his "ability to remain loyal to the elected echelon," prompting opposition accusations that his loyalty lies with politicians, not the state.
- Turkish President Recep Tayyip Erdogan dismissed Israeli and Greek objections to a possible US F-35 sale to Turkey as having "no place in my world," after Ankara branded Netanyahu's CNN warning that the sale would upend the regional power balance "disinformation." Trump called the sale "a decision we are going to make," crediting Turkey for staying out of the fighting on Iran's side. Israeli officials cast Ankara as a broader rival on maritime navigation, energy infrastructure and Greek-Cypriot ties, warning its Russian S-400 system could leak F-35 stealth data. Defense Secretary Pete Hegseth was due to raise the sale with Netanyahu and Katz Wednesday.
- Rahm Emanuel, a potential 2028 Democratic presidential candidate and longtime Israel defender, told Tel Aviv University Wednesday that Israeli leadership has turned the country into a "territorial pariah." He warned "you cannot fight indefinitely against a world that has stopped believing you

have the right to fight." He said "unconditional support has produced a prime minister who has presumed that his strategic interest would incur no political costs" from ignoring US settlement concerns and sparking "a regional war," and called for ending "the American taxpayer's subsidy of Israel's defense budget." A new poll found 58% of Democrats now call US support for Israel excessive, up from 45% in 2024.

- An Israeli military source said the army remains "at the same level of alertness and readiness" as recent days, ready for offensive or defensive operations in Iran, after Trump declared the memorandum with Tehran over.
- A masked vandal smashed Haaretz's Tel Aviv office entrance Wednesday. It was the second such attack on an Israeli newsroom in days, after Channel 12's glass entrance was shattered Sunday amid right-wing campaigns against critical coverage.
- Ireland's parliament approved the Israeli Settlements (Prohibition of Importation of Goods) Bill Tuesday, banning imports of residential, agricultural and business goods from Israeli settlements in the West Bank and East Jerusalem, a measure still requiring upper-house approval. The center-right government drafted the bill's wording around the International Court of Justice's 2024 advisory opinion that Israel's occupation of the West Bank, East Jerusalem and Gaza is unlawful. Spain imposed a narrower package of settlement-import restrictions last October. Hamas called the vote a "historic decision in line with international law" and urged other parliaments to adopt similar legislation.

LEBANON

- Israeli forces shot a Hezbollah fighter dead in Bint Jbeil Tuesday. The killing came during a search of a building where a reservist was wounded last week, and an IDF military dog died in the firefight. The army opened an internal probe after a competing account said soldiers first wounded the man and tried to negotiate before he was shot near his weapon. Israeli artillery shelled the strategic Ali al-Taher hill, where Israel says Hezbollah fighters hide in tunnels, warplanes struck the area between Beit Yahoun, Kounine and Baraashit, and tanks shelled Haddatha, days before Lebanese and Israeli envoys hold a new round of talks in Rome.
- President Joseph Aoun said Wednesday his July 21 White House meeting with Trump would bring "positive outcomes" for Lebanon and reflects "unprecedented" American interest in ending the cycle of Israeli attacks.
- Amnesty International called for an investigation into three Israeli airstrikes on Tyre, Nabatieh and Arkay in March that killed 24 civilians, including 12 children and whole families, as possible war crimes.
- Lebanon's judiciary postponed a hearing for former central bank governor Riad Salameh over the \$330 million Forry Associates transfer, after he sued the presiding judge, with a separate hearing set for July 30.
- Lebanon's military court approved singer-turned-militant Fadel Chaker's release on bail in three security cases and the Abra case linked to 2013 clashes with the army, while a full trial continues.
- Free Patriotic Movement leader Jebran Bassil demanded Hezbollah "submit to the state," accusing authorities of enabling Israel's killing of civilians, and warning the framework deal leaves the decision "in the hands of Israel and Iran." Hezbollah chief Naim Qassem called the deal a sellout

offering redeployment rather than Israeli withdrawal, vowing “not a single article of this agreement shall pass.” Kataeb’s Sami Gemayel told Hezbollah “the very least you should do is shut up” and let the presidency negotiate. Aoun said most Lebanese, including Shiites, back the talks he chose “because I could not stand by and watch my country being led into the abyss.”

- The EU Aviation Safety Agency recommended airlines avoid Lebanese, Iraqi and Iranian airspace through August 31 amid renewed US-Iran strikes, deepening fears of new flight cancellations to Beirut.
- Energy Minister Joe Saddi said Lebanon’s electricity-import contract with Syria is “almost ready,” part of a broader push including reviving the Arab Gas Pipeline with Syria and Jordan.

SYRIA

- Syrian authorities blame Assad-regime remnants for the twin car-and-bin bombing that killed one and wounded 36 in Damascus on Tuesday, minutes after French President Emmanuel Macron left the Four Seasons Hotel for the presidential palace. They also blame the remnants for the July 2 cafe bombing beside the Palace of Justice that killed at least nine people, mostly lawyers, with the wounded toll now revised to 22. Authorities say both attacks aimed to disrupt trials of Assad-era officials and Syria’s rehabilitation. The interior ministry has reinstated checkpoints, blast walls and mandatory vehicle searches around government buildings, courts and embassies, and the Central Bank of Syria reactivated its account at the Bank of France, reopening a banking channel. Secretary of State Marco Rubio notified Congress that the Trump administration will remove Syria from the state sponsors of terrorism list, a designation dating to 1979, effective in 45 days unless lawmakers block it. Rubio called the move a step that “will unlock international trade and investment” for Syria’s reconstruction. Trump delivered the news to President Ahmed al-Sharaa in person at the NATO summit in Ankara, their fourth meeting since May 2025, telling reporters al-Sharaa is “doing an unbelievable job in unifying Syria.” A bipartisan congressional delegation led by Senator Jeanne Shaheen, joined by envoy Tom Barrack, met al-Sharaa separately in Ankara to discuss follow-on sanctions relief. ISIL remnants draw fresh suspicion as an alternative culprit in the bombing spate, retaining a tangible presence in northeastern Syria around their former capital, Raqqa. Al-Sharaa’s government continues to grapple with high unemployment and uncertain rule of law two years after Assad’s ouster, and with residual networks of the civil war’s outside players, including Russia, Iran and allied Shia militias, that still complicate the transition. Syria’s OPCW mission, with Qatar’s support, put forward a draft resolution restoring Damascus’s rights under the Chemical Weapons Convention to the Hague’s 112th Executive Council session, backed by 65 member states.

PALESTINE

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Ceasefire Violations and Civilian Toll

- Israeli fire killed nine Palestinians across Gaza on Wednesday, among them a six-year-old shot in Zeitoun and four people killed in a drone strike on a displaced-persons tent in Al-Mawasi. An aid truck driver, Ahmad Nasser Isleem, died after being shot in the head while loading aid in Rafah.

A separate Tuesday strike on a vehicle in Gaza City's Sabra neighborhood killed Mohammed al-Wahidi, 57, director of the Egyptian Committee in Gaza, the driver, and two child siblings, the youngest of whom died of wounds Wednesday, raising that toll to four. Israel said it was targeting a Hamas militant. Cumulative deaths since the October truce reached 1,084, with 3,491 injured.

- The UN recorded nearly 9,300 chickenpox cases in Gaza over two weeks, more than half in Khan Younis, driven by overcrowding and hygiene collapse across the enclave's roughly 1,600 displacement sites.

Governance, Reconstruction and Negotiations

- Trump's Board of Peace is planning a pilot 'humanitarian zone' in Rafah, southern Gaza, meant to hold tens of thousands of vetted Palestinian civilians. It would serve as a 'starting point' for the National Committee for the Administration of Gaza (NCAG) to assume day-to-day governance under the 20-point transition plan. The zone would be secured by multinational troops from the International Stabilization Force (ISF), with NCAG handling screening and access control and movement in and out staying free for unarmed civilians. Diplomats and NGO officials working in Gaza warned privately that closed humanitarian zones are incompatible with international humanitarian law.
- A Hamas delegation led by Khalil al-Hayya, the movement's Gaza chief, arrived in Cairo to meet mediators and press talks on consolidating the ceasefire and moving to the agreement's second phase, media advisor Tahir al-Nunu said. Hamas is pushing to increase aid entering Gaza, complete the first phase's implementation, and speed the NCAG's entry into administration following the Gaza governing committee's resignation two days earlier. The delegation's return to Cairo less than two days after a multi-day round of talks last week points to intensifying negotiation rounds.
- Nearly 40,000 public employees across Gaza face an uncertain future over their jobs, salaries and years of service after Hamas announced Monday it was dissolving its governing authority, with administrative responsibilities set to transfer to the NCAG. NCAG chief commissioner Ali Shaath said the technocratic committee 'stands fully prepared to assume its national' duties. Teacher Atiya Shaheen said civil servants should not become victims of political disputes, since governments change everywhere but civil servants remain in place.
- Israeli demographer Oded Bochter is proposing to dump rubble from Gaza's war-damaged buildings into the sea off its coast, calculating that clearing 65 to 70 percent of destroyed structures could reclaim at least 10 square kilometers of shallow coastal water for a new city. He argues the plan would ease population density and avoid the traffic and air pollution of trucking debris into Israel. He stressed the dumping must be sorted, separating glass, iron and explosives, and warned that unorganized dumping ruined swimming beaches at Tel Aviv's Charles Clore beach and in postwar Beirut. The proposal surfaces as the first tender for rubble removal in Rafah was published, reviving reconstruction debate.

Rights, Accountability and Access

- An Israeli soldier's photo of a Palestinian man from Gaza, stripped to his underwear, blindfolded and bound face-down to an iron rod, corroborates years of reporting on Israeli torture of detainees and may itself constitute a war crime, rights groups said. The image, captioned 'good morning' in Hebrew, circulated on a now-deleted personal account before a Palestinian activist publicized it. Oneg Ben Dror of Physicians for Human Rights Israel said the photo confirms thousands of detainee testimonies and called Israeli detention facilities 'torture camps for Palestinians.' Israel's

military confirmed the photo's authenticity, said it did not align with IDF values, and opened an inquiry.

- Saudi UN envoy Abdulaziz Alwasil told the Security Council that conflict-related sexual violence, including violations in Palestine, demands perpetrator accountability under international law.
- Srinivasan Muralidhar, the retired Indian judge chairing the UN's Independent Commission of Inquiry, said the panel's June report found Israel killed at least 20,179 Palestinian children in Gaza's first two war years.
- Israeli authorities issued a demolition order for a Palestinian primary school in Masafer Yatta, south of Hebron in the occupied West Bank, threatening the education of roughly 150 children from several rural communities. The school has 14 days to challenge or comply before authorities can proceed with the demolition. Masafer Yatta has faced repeated Israeli demolition orders, settlement expansion and military restrictions, and rights groups say several other schools in the area face similar threats, with many students otherwise forced to travel through checkpoints or dangerous roads to reach alternative schooling.
- Arab League Secretary-General Nabil Fahmy said Israel barred his planned visit to the occupied Palestinian territories, where he intended to meet Palestinian President Mahmoud Abbas in Ramallah.

KEY REGIONAL EVENTS

Bahrain, Kuwait, Qatar

- Qatar's Interior Ministry raised the security threat level to high before dawn Thursday, ordering residents indoors, then lifted the alert hours later once the danger passed. Bahrain sounded air-raid sirens three times over Manama as explosions echoed nearby, part of the fresh Iranian barrage also striking Kuwaiti and Bahraini bases. Kuwait's General Staff said air defenses intercepted two ballistic missiles and 13 drones overnight with no casualties or damage, and flights diverted from Kuwait International Airport during the strikes. Residents voiced rising anxiety at the return of attacks after less than two weeks of calm. A Bahraini businessman called the renewed strikes "completely unacceptable."

Saudi Arabia

- Saudi Foreign Minister Prince Faisal bin Farhan met Omani counterpart Sayyid Badr bin Hamad Al-Busaidi in Muscat, where both stressed safeguarding waterway security and navigational freedom amid the Strait of Hormuz tensions. Saudi Arabia's Interior Ministry announced the execution of 81 Saudi and non-Saudi nationals, bringing 2022's total to 92, prompting Amnesty International's Lynn Maalouf to condemn trials relying on torture-extracted confessions.

UAE

- The UAE and Singapore jointly sponsored a freedom-of-navigation resolution at the International Maritime Organization on Wednesday, calling on states, ship owners and operators to uphold navigational rights for commercial vessels transiting international straits. IMO Secretary-General

Arsenio Dominguez condemned the past two days' attacks on ships crossing the Strait of Hormuz as "reckless," warning they endanger the nearly 6,000 seafarers still transiting the waterway. He urged flag states and operators to avoid exposing crews to unnecessary danger while their safety cannot be assured. Delegates said the resolution signals support for open shipping lanes as the conflict reignites in the strait.

Iraq

- Baghdad is weighing revival of a national maritime shipping fleet after decades without Iraqi-flagged vessels. MP Khalid Sido argues the push pays for itself. War-risk premiums have driven Gulf shipping costs to three to four times pre-war rates since Iran shuttered the Strait of Hormuz, Iraq's main export route for over 3.3 million barrels a day. With crude at roughly 88% of government revenue, Baghdad is also striking fresh deals with China, India and France to diversify trade partnerships and hedge its economic future between Eastern and Western powers. It is tilting toward Asia as Western firms hesitate on long-term investment.

Yemen

- A woman identified as Layla al-Maqtari says a Houthi soldier molested her at an unlit checkpoint between Hudaydah and Ta'izz enforcing the mahram guardian policy, and Houthi authorities detained the soldier involved. A Royal Saudi Air Force Beechcraft King Air 350ER is conducting intelligence, surveillance and reconnaissance flights near Najran, on the border with Houthi-controlled northern Yemen.

KEY INTERNATIONAL EVENTS

- NATO members pledged more than \$50 billion in new defense and security spending at their two-day Ankara summit, plus €70 billion (\$80 billion) in Ukraine military aid for 2026, as President Trump's fresh strikes on Iran overshadowed proceedings. Trump opened the second day calling Iran's leadership "scum" and threatening to halt all trade with Spain ("a wasted cause"). He renewed his demand for Greenland, prompting Danish Prime Minister Mette Frederiksen to declare "Greenland is of course not for sale." NATO chief Mark Rutte called the new Iran strikes "absolutely necessary." Trump closed the summit praising "tremendous unity," and NATO's final declaration reaffirmed its Article 5 "ironclad commitment."
- The IMF cut its 2026 global growth forecast to 3.0 percent, down from 3.1 percent in April and from 3.5 percent last year, citing the energy shock from the Iran war even as AI investment partially offsets it. The fund projects inflation accelerating to 4.7 percent this year, up from 4.1 percent in 2025, and oil prices up nearly 32 percent, with growth rebounding to 3.4 percent in 2027. IMF research department deputy director Petya Koeva Brooks warned that "developments overnight illustrate the uncertainty and risks that surround the outlook," noting the forecast still assumes the Strait of Hormuz reopens this month despite Wednesday's resumed US strikes.
- NATO formally launched four "flagship projects" at the Ankara summit, covering counter-drone systems, maritime security, counter-terrorism, and defense against chemical and nuclear weapons, aimed at bolstering Gulf partners' response capacity. NATO's special representative for the Middle East, Javier Colomina, said the projects, approved in Sweden in May, answer security

needs partners “have had, particularly in the last months,” citing Wednesday’s drone and missile attacks on Kuwait and Bahrain as underscoring the urgency.

- British Prime Minister Keir Starmer unveiled a UK-led coalition of roughly a dozen European countries committing \$50 billion over the next decade to develop long-range precision-strike missiles, with a range starting at 300 kilometers and extending beyond 2,000 kilometers in some cases. Starmer, announcing the initiative at the NATO summit, called for allies to “show the unity and the strength of NATO” amid the Ukraine war and the US-Iran conflict.
- President Trump told Ukrainian President Volodymyr Zelensky at the NATO summit that Washington would license Ukraine to manufacture Patriot air-defense interceptors domestically, a request Kyiv has long sought.

MARKETS

- Brent crude surged as much as 5.3 percent to \$78.09 a barrel and WTI jumped 5.4 percent to \$74.23, after President Trump declared the ceasefire with Iran “over” and Washington revoked its temporary waiver on Iranian oil sanctions following the Hormuz tanker attacks. Wall Street opened lower. The Dow fell 167 points, the S&P 500 dropped 27, and the Nasdaq lost 114. Gulf bourses reversed course, sliding Wednesday on the fighting and fresh sanctions after most had risen Tuesday. Saudi Arabia had cut its August Arab Light price to Asia by \$11 a barrel that day.
- At least four oil and gas tankers, including three Qatar Energy LNG carriers and an Indian-flagged tanker hauling two million barrels of Kuwaiti crude, turned back from the Strait of Hormuz since Tuesday. Renewed vessel attacks pushed daily crossings down to roughly a third of pre-war levels. Shippers now split transits between a northern corridor near Larak Island (32 percent) and a newer Omani-coordinated southern route (23 percent). The International Maritime Organization put the number of sailors stranded aboard Gulf vessels at 6,000, warning the attacks deepen the fear and psychological strain on crews unable to leave safely.

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