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READER EDITION

June 11, 2026

ISRAEL BRIEF

Thursday, June 11

American jets work Iran's air defenses a second night and spare the energy core, Riyadh routes its freight through Ankara, and the coalition remains busy.

◇ URIEL ZEHAVI

THE BOTTOM LINE The indictment does our argument for us: the swastika and the inverted triangle carry the same instruction, and the Detroit federation sits on the target list because a federation is what the network means when it says “Zionist.” Note who showed up to defend them — the campus Jewish Voice for Peace branch called a rally at the courthouse [the anti-Zionist Jewish group volunteering as the legal defense fund for people who talked about burning a Jewish official's house down with his family inside]. The same impulse runs from Ann Arbor to Toronto, where an activist outfit spent Thursday demanding the release of the Kataib Hezbollah commander charged last month over eighteen attacks on Jewish sites, one of them a planned hit on a New York synagogue. The indictments are coming faster than they were a month ago. Whether the convictions come with them, or whether this goes the way of last May's UMich encampment charges, quietly dropped, is something else.

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THE US is back over Iran for a second night, and, theoretically, it should retire the last of the “bullied into Netanyahu’s war” reading for good. Underneath it, the regional order is being rewired without Israel in the room — Riyadh signed a major freight deal through Ankara, not Jerusalem — while the coalition spends its final weeks before dissolution writing into law the things it could not win any other way.

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Flash Brief

US strikes again, holds the card: Washington works Iran's air defenses and command sites around Hormuz a second night and leaves the energy core untouched. See The War Today.

Iran answers the Gulf: Tehran fires on bases in Jordan, Bahrain and Kuwait, hurts a child in Bahrain, and again spares Israel. See The War Today.

Hormuz claim: The IRGC declares the strait fully closed to shipping; CENTCOM says commercial traffic is still moving through it. See The War Today.

Second tanker: American aircraft disable the Settebello, killing three Indian crew, and Delhi summons a US diplomat. See The War Today.

Beqaa: Israel strikes deep around Baalbek as Netanyahu and Herzog talk past Hezbollah to the Lebanese. See The War Today.

Torah Study: The exemption Basic Law clears its first reading, and Smotrich strips the committee seats of a member who voted no. See Inside Israel.

Appointments lockdown: The coalition hands ministers sole power to name the Chief of Staff, the spy chiefs and the Attorney General. See Inside Israel.

The Likud list: Netanyahu moves to scrap the party primary and hand-pick the slate through slot 32. See Inside Israel.

The Ankara corridor: Saudi Arabia and Turkey sign a Gulf-to-Europe rail line that routes trade around Israel through jihadist-run Syria. See Israel and the World.

Michigan conspiracy: A federal grand jury charges eight campus activists who plotted to poison and firebomb Jewish officials. See Israel and the World.

The IMEU pipeline: A pro-Palestinian nonprofit washes \$400,000 into Justice Democrats from a strip-mall mailbox. See Israel and the World.

WHAT looks from a distance like a single Iran story is three separate machines running on their own power. The American strikes keep working the air defenses around Hormuz and keep sparing the target that would actually coerce the regime, while Iran's answer lands on the Gulf monarchies that financed the calm and spares the expected strikes on Israel everyone expected. While Jerusalem is fixed on the strike map, Saudi Arabia quietly built the next decade's trade order through Ankara, and the coalition continues to work on permanent exemption and appointments control.

The War Today

WASHINGTON STRIKES IRAN A SECOND NIGHT AND HOLDS THE ENERGY CARD

The United States ran a second consecutive night of strikes inside Iran, and CENTCOM said the round again worked military surveillance, communications, and air-defense sites — Bandar Abbas, Qeshm, Hengam, and the IRGC positions down the Hormozgan coast, the same class of target it opened on two nights earlier. Iran's energy infrastructure, the one card in the American deck that could actually break the regime, stayed pointedly untouched for a second night. A B-52 took off from Sicily with its transponder lit so the monitoring stations would see it coming. Iran answered against the Gulf bases again, firing twelve ballistic missiles at the Muwaffaq Salti base in Jordan and more toward Bahrain and Kuwait. Jordan intercepted twenty, Bahrain logged a fire near the Sheikh Isa base and a child hurt by falling debris, Kuwait shut its airspace. The IRGC declared the Strait of Hormuz fully closed to all shipping while CENTCOM said commercial traffic was still transiting. American aircraft disabled a second tanker in two days, the Settebello, killing three of its twenty-four Indian crew. Through all of it Tehran did not fire at Israel, and Israeli officials assessed it would not. Trump told Fox the bombing would resume — “we’ll bomb the sh*t out of them tomorrow” if no deal — and convened a situation-room session on a broad-but-short campaign against power plants and bridges, while the nuclear table narrowed toward an interim outline with the IRGC the standing obstacle on the Iranian side.

ASSESSMENT

A president who spent the spring rationing Israel's permission to fire is firing over his own downed aircrew. For a second night the strikes work the air defenses and command nodes around Hormuz and leave the energy core alone, the one blow the regime's political echelon fears enough to keep the IRGC's hands off Israel [the restraint on both sides holds only as long as that fear does]. Limited strike packages were supposed to buy deterrence and instead bought a closed-strait announcement, two dead-tanker incidents, and an IRGC that weaves three narratives at a time, which is the early answer on whether short campaigns coerce a regime that reads every pause as a chance to keep the centrifuges spinning.

ISRAEL STRIKES THE BEQAA AS NETANYAHU TALKS PAST HEZBOLLAH TO THE LEBANESE

The IDF struck deep into Lebanon while the eye was on Iran, hitting Hezbollah sites near Baalbek and across the Beqaa valley and killing twelve to thirteen in the Tyre area, with Unit 869 dismantling the drone-crew infrastructure the group uses to bleed troops and stall a ground maneuver. Northern towns woke before dawn to launches that the army said fell in areas where its forces operate. Hezbollah, for its part, is firing into the strip it can call a battlefield to keep the Dahiyeh-for-the-north threat alive without owning a strike on a town. Sirens for a hostile aircraft sounded over Misgav Am, Shlomi, and Margaliot. Netanyahu addressed the Lebanese people directly — Israel fights Hezbollah, not Lebanon, take your future and reject the group serving Tehran — and Herzog made the same appeal in Arabic toward Aoun, while Parliament Speaker Berri worked to sink the Washington framework from inside Beirut.

ASSESSMENT

Berri laboring to kill the deal from the speaker's chair is the disarmament premise collapsing exactly where we have watched it fail all spring — a Lebanese state cannot confiscate Hezbollah's weapons because the Lebanese state is partly Hezbollah. Netanyahu and Herzog talking over the group to its hostages is the same wager underneath the strikes: that the split Aoun gestured at becomes a government that can sign for the south. It will not arrive while Berri can still table it.

THE BOARD OF PEACE ROUTES AROUND HAMAS AS THE IDF HOLDS JENIN

The Board of Peace told reporters it will not wait for a Hamas answer on the disarmament plan and will advance short-term steps in the areas of Gaza outside Hamas control, hours after Hamas again denied agreeing to the weapons clause — the mediators' newest formula hands the "heavy arms" to an agreed Palestinian body and lets Hamas keep the light rifles and run collection in parallel, which is the surrender that surrenders nothing. The IDF, for the first time since Oslo, stood up a permanent military post inside Area A near the Jenin camp, hardening the counter-terror grip in the heartland we have watched slide toward a second Gaza. And Greek services rolled up a Hamas cell built to hit Israeli targets in Europe, its operatives trained in Malaysia, as the group relocates its planning offshore and activates sleepers.

ASSESSMENT

Handing the "heavy" weapons to a Palestinian body while keeping the rifles and running collection on Hamas's own clock is a refusal dressed as a concession, and the Board of Peace declining to wait for the answer reads the refusal correctly — it routes around the veto instead of negotiating with it. The permanent post inside Area A is sovereignty enforced where it was never declared, the army holding ground near Jenin that no framework gave it because the terror bench there keeps refilling. The Greek roll-up is the same campaign moved to softer jurisdictions.

Inside IsraelTORAH STUDY CLEARS ITS FIRST VOTE, AND SMOTRICH PURGES THE DIS-
SENTER

The Knesset passed Basic Law: Torah Study in preliminary reading, the version Deri carried after the clause equating yeshiva students with serving soldiers was stripped out and sent back to committee. Four coalition members voted against it. Smotrich removed one of them, Moshe Solomon, from all his Knesset committee seats within hours, and Solomon learned of it from the press. Likud's Dan Illouz, who also voted no, drew a public rebuke from Shas benches. The bill recognizes long-term Torah study as "significant service to the state" and clears the last obstacle to permanent exemption while the IDF runs roughly 12,000 combat soldiers short and the evader roll passes 39,000. Deri, in the Shas paper, praised the Arab MKs as understanding the value of Torah better than the Likud members who heckled the bill, and promised to do everything to stop the arrests of evaders. The Jerusalem Faction kept the streets busy a second straight night over the transfer of 19 detained yeshiva

students to the army, blocking the Russian Compound, Route 4, and the approaches to Nitzan and Hadarim prisons, and issuing a mock “evacuation notice” to residents of central Israel.

ASSESSMENT

The coalition is spending its last weeks before dissolution writing into a Basic Law the one thing it could not defend on the floor, which is why the equivalence clause came out before the vote and not after — even the coalition could not put its name to non-servers ranked beside the men doing the fighting. Smotrich firing Solomon for voting his conscience is the cost of a bill nobody inside Religious Zionism actually wants to own, paid by the one faction member who voted his objection [the votes are thinner than the preliminary margin]. Deri thanking the Arab parties for the assist [the anti-Zionist benches have their own reasons to want the army short] while the Jerusalem Faction blockades the prisons holding 19 of his community’s own evaders is the burden question stripped of the secular-religious frame the press keeps drawing on it: 90,000 men outside the system, a statute being written to keep them there, and a street that riots when nineteen are asked to serve.

THE COALITION LOCKS DOWN WHO STAFFS THE STATE BEFORE THE KNESSET DISSOLVES

The Knesset gave final approval overnight to the bill pulling the police internal investigations unit out of the State Attorney’s Office and rebuilding it under the Justice Minister, where a committee the minister controls names its director — one of the core judicial-reform laws. Hours earlier the plenum passed the Appointments Law in preliminary reading, handing the elected echelon sole discretion to name and dismiss the most sensitive posts in the state, the Chief of Staff, the police commissioner, the heads of Shin Bet and Mossad, and the Attorney General among them. Rothman’s committee is preparing the Attorney General split for second and third reading, on track to take effect January 1, 2027 with Baharav-Miara holding her prosecutorial powers until her term ends in February 2028. Against that, the prosecution filed an amended indictment adding Jonatan Urich, Netanyahu’s communications adviser, as a third defendant in the Bild classified-leak case, charging him with passing and holding secret material with intent to harm state security and destroying evidence, and asking the court to bar him from the Prime Minister’s Office and every secure facility until the case ends.

ASSESSMENT

This is the legal guild’s claim on who runs the state being contested clause by clause before the election settles which side holds the pen, and the coalition is moving the structural pieces — the police-probe unit, the senior-appointments power, the carve-up of the Attorney General’s office — while it still has a majority to move them. The legal establishment reads each of these as the politicization of the security services and calls the police bill the burial of corruption investigations. We read it as the elected branch reclaiming appointments the unelected branch spent three years treating as its own [the same fight tracked at the Comptroller’s seat and the Mossad appointment, now written into statute]. The Urich indictment, approved personally by the Attorney General and timed to land the same week the coalition strips her office for parts, is the counter-pressure landing exactly where the legal-guild reading predicts it will.

☒ *Dossier: The Unfinished State — The fight over who names the Chief of Staff, the spy chiefs and the Attorney General — and the carve-up of the AG's office itself — is the constitutional-incompleteness argument this Dossier builds: with no written constitution to fix the line, appointments power is whatever the branch holding the pen says it is, and both branches are now racing to hold it before the election.*

NETANYAHU MOVES TO SCRAP THE LIKUD PRIMARY AND HAND-PICK THE LIST

Netanyahu is pushing to replace the Likud primary with an appointments committee of friendly mayors and public figures that would set the list through slot 32, reserving six to eight guaranteed spots for himself at the expense of rivals like Gallant and Akunis. What began as a maneuver to lock a few reserved seats is gaining momentum on three fronts: seven Likud members resigned this term, the list looks set to stay largely unchanged anyway, and the Comptroller flagged a mass-membership drive inside the party. Netanyahu told allies the 12 million shekels a primary costs is effectively a donation to the Eisenkot and Bennett campaigns. In parallel he is pressing Smotrich and Ben-Gvir to merge Religious Zionism and Otzma Yehudit, offering each a reserved slot on the Likud list, with polls showing the bloc close enough to the 3.25% threshold to put right-wing seats at risk. Eisenkot, casting himself as the main challenger, told Ynet that Netanyahu “knows he is responsible” for October 7 and “will lose,” and rolled out a new recruit to his Yashar party. Trump told ABC it is “an open question” whether Netanyahu wants another term; Likud answered that he will run and win.

ASSESSMENT

A prime minister who reads the cycle as losable does not spend his energy on slate mechanics — and Netanyahu is spending all of it, scrapping the primary that could surprise him, reserving his own slots, and trying again to weld the security flanks into a single run so no votes wash out below the threshold. He is playing the vote as winnable and arranging the board so the only variable left is his own. The merger push is the same arithmetic that forces the haredi alliance forcing the next coalition's shape — Smotrich and Ben-Gvir both keep refusing the joint run that would protect the bloc, and Netanyahu keeps offering, because the seats that wash out below 3.25% are the seats that decide whether there is a coalition to reconstruct at all.

Israel and the World

ERDOGAN SIGNS THE RAIL CORRIDOR THAT ROUTES GULF TRADE AROUND ISRAEL

Saudi Arabia and Turkey signed memoranda this week for an overland rail corridor running from Istanbul through post-Assad Syria, down through Jordan into the Saudi network at Haditha, with ambitions reaching Oman and the Indian Ocean. The line is pitched as a Hormuz bypass. Thirty-plus days by sea cut to under two weeks by land, \$5.5 billion in cost, the Asian Infrastructure Investment Bank already in for \$750 million. Every freight train crosses

Aleppo and Damascus, territory Ankara now treats as an economic protectorate. Turkish companies operate in Aleppo, Turkish banks are opening branches across Syria, the bilateral trade target is \$10 billion by 2030, and the government in Damascus grew out of Hayat Tahrir al-Sham, which Erdogan calls liberators and the EU and Washington still list as a terror group. The corridor is the direct replacement for IMEC, the India-to-Europe route Biden announced in 2023 that ran freight through the UAE, Saudi Arabia, Jordan and Israel on the wager that the Abraham Accords had made Jerusalem the indispensable commercial node. IMEC died with October 7 and has not recovered. The same morning the corridor surfaced, Erdogan told his parliament that Israeli strikes in Syria and Lebanon now “threaten Turkey,” warned against “adventures” in the Eastern Mediterranean as Cyprus signed a defense pact with France, and his interior minister told the ruling party Turkey would one day “take control of Jerusalem.” Netanyahu called Erdogan an antisemitic dictator carrying out genocide against the Kurds and bankrolling Hamas.

ASSESSMENT

Riyadh signed the logistics deal it could build today. Unfortunately for Israel and the West, the one it could build today runs through Ankara, not Jerusalem. The kingdom edged toward Israel for two years and then put its freight on Erdogan's track while Israel was busy at Fordow and on the Lebanon line. Erdogan did not beat anyone. He waited for the war to consume Israeli attention and laid the financial plumbing of the next decade's regional order underneath it, with an Islamist Damascus as the operational spine and the Hejaz Railway as the Ottoman costume. The rail is unfinished — the Iraqi junction is theoretical, the financing partial, post-conflict Syria has not shown it can run freight reliably — and it entrenches faster than the technical studies close. Watch whether Washington, which spent the week promising “no Israel-Turkey clash on my watch” while praising Erdogan as a strong leader, treats a NATO member building a Gulf-to-Europe land bridge through a jihadist-governed protectorate as a problem or a convenience.

THE DARK-MONEY MACHINE WIRING ANTI-ISRAEL PRIMARIES RUNS THROUGH A STRIP-MALL MAILBOX

The Institute for Middle East Understanding, a longtime promoter of Palestinian narratives in media and the arts, has spun up a political arm and become the single largest donor to Justice Democrats this cycle. The IMEU Policy Project formed five months after October 7, took \$400,000 in seed money from its parent, and has since routed that exact \$400,000 into Justice Democrats' accounts — outpacing even the Tlaib campaign, the PAC's patron of past years. Both groups operate out of the same PostalAnnex maildrop in a Tustin, California strip mall. As far as we can tell, the Policy Project has never registered to operate in the state, and the original donors behind its money stay hidden. The network's spending is visible enough: \$260,000 behind Philadelphia nominee Chris Rabb, \$200,000 in mail for New Jersey's Adam Hamawy, ad campaigns against Mike Lawler, Cory Booker, and Ruben Gallego, plus sites running Tlaib's resolution declaring Israel guilty of genocide and a “NoWar-ForIsrael” page blaming Israel for the US decision to strike Iran. Federal rules bar an organization with IMEU's tax designation from spending on politics, and OpenSecrets notes the FEC has already forced Justice Democrats into

multiple amended filings over discrepancies between what it reports giving and what its partner PACs report receiving.

ASSESSMENT

This is the terrain we keep saying the adversary owns and the home side keeps treating as a broadcast medium to be appealed to — the patient construction of an electoral pipeline that converts foreign-narrative money into Democratic nominees, one primary at a time. A body whose tax status forbids political spending washes it through a spin-off whose original donors never surface [dark money, the thing progressives spent a decade decrying]. The “\$400,000 in, \$400,000 out” symmetry and the contradictory FEC filings are the kind of paper trail that costs a campaign-finance lawyer a weekend and a candidate a primary, if anyone with standing decides the enforcement is worth the trouble. On this beat, rarely.

A FEDERAL GRAND JURY CHARGES THE MICHIGAN CAMPAIGN AS CRIMINAL CONSPIRACY

A federal grand jury in Detroit indicted eight activists tied to the University of Michigan over a two-and-a-half-year campaign of threats, stalking, and vandalism against university officials, local businesses, and the Jewish Federation of Metropolitan Detroit. The indictment, sealed in May and unsealed Wednesday after a multi-state arrest sweep through Michigan, Illinois, and Wisconsin, describes meetings to research targets’ home addresses and children, and discussions of poison, bombs, and “psychological torture.” One defendant, a medical student, talked about becoming a victim’s doctor to “poison her slowly.” Another called for conspirators to “get into that house then burn it down.” A third put a target’s family on a “hit list.” The group threw jars of butyric acid through windows, glued doors shut, and tagged homes with inverted red triangles and the red handprint of the Ramallah lynching. On the first anniversary of October 7 they hit the Detroit federation building itself, painting over its cameras and writing “Intifada.” Two defendants face witness-tampering charges for confronting a student they believed was cooperating with the FBI. The charges carry up to twenty years.

ASSESSMENT

The indictment does our argument for us: the swastika and the inverted triangle carry the same instruction, and the Detroit federation sits on the target list because a federation is what the network means when it says “Zionist.” Note who showed up to defend them — the campus Jewish Voice for Peace branch called a rally at the courthouse [the anti-Zionist Jewish group volunteering as the legal defense fund for people who talked about burning a Jewish official’s house down with his family inside]. The same impulse runs from Ann Arbor to Toronto, where an activist outfit spent Thursday demanding the release of the Kataib Hezbollah commander charged last month over eighteen attacks on Jewish sites, one of them a planned hit on a New York synagogue. The indictments are coming faster than they were a month ago. Whether the convictions come with them, or whether this goes the way of last May’s UMich encampment charges, quietly dropped, is something else.

Briefly Noted

Diplomacy & Geopolitics

- *Arutz Sheva*: The Security Council issued a press statement mourning a Serbian UNIFIL peacekeeper killed in southern Lebanon and reaffirming Resolution 1701 without once naming the party that violated it, drawing Danon's charge that the Council cannot bring itself to write the word Hezbollah even over a dead peacekeeper of its own.
- *Jewish Insider*: Jack Schlossberg, running for Nadler's open Manhattan seat, came out for the Block the Bombs Act at Tuesday's debate after months of "unsure" — the only one of four NY-12 Democrats to back the arms-restriction bill, and a marker of where the conditioning-aid position now travels in a heavily Jewish district.
- *Jerusalem Post*: Sa'ar announced Israel will open a representative office in Papua New Guinea, days after reopening the embassy in Fiji, extending the Pacific push among the small states that move their missions toward Jerusalem while the larger capitals draft sanctions lists.

Public Diplomacy & Media

- *Jerusalem Post*: Columbia's Mohsen Mahdawi — the former Birzeit Fatah student-movement head ordered removed to Jordan — appealed to two federal circuits to block the deportation, the ACLU recasting a green-card revocation over foreign-policy grounds as a First Amendment case.
- *Algemeiner*: Gwyneth Paltrow fronts a new ad for a Herzliya luxury tower, closing on the driver who hears "51 Park," guesses "New York?" and gets "Herzliya — Israel" with a smile.
- *Jerusalem Post*: Iran told FIFA it will halt its own World Cup matches if "unauthorized" flags or anti-regime chants appear in the stands, a preemptive demand for silence days after protesters at the FIFA Congress argued the team represents the IRGC and not Iranians.
- *Jerusalem Post*: An ADL-JLens analysis put a price on BDS-aligned divestment for New York's five pension funds — roughly \$37.5 billion in forgone returns over a decade — naming Mayor Mamdani's stated support as the political vehicle and the math as the cost.

Domestic & Law

- *Ynet*: State prosecutors indicted a 16-year-old from Maale Adumim for beating a Palestinian family's dog in Binyamin, charging the attack as racially motivated and asking the court to hold him until proceedings end. The indictment is Israel policing the disorder the foreign press files under "settler violence" before it becomes their story.
- *Israel Hayom*: Guy Echlinger will be charged Sunday with murdering Rabbi Yishai Por inside a Bnei Brak synagogue, stabbing him at prayer in front of his young son three weeks ago. The judge asked aloud why three prior orders to move the suspect for psychiatric evaluation went unheeded.

Economy, Tech & Infrastructure

- *Globes*: Elbit's US arm teamed with Anduril to offer the SIGMA NG mobile cannon for the US Army's program to replace the M-109 howitzer — the Israeli system carried into the largest land-artillery tender in the West on the back of a \$61-billion American partner.
- *Times of Israel*: Israeli startups raised about \$8.6 billion in the first five months of 2026, up 45 percent and concentrated in cyber and AI, even as the shekel at a 33-year high quietly shortened every dollar-funded runway.
- *Israel Hayom*: Cyber firm Cyera closed a \$600 million round at a \$12 billion valuation, quadrupling its price in six months on the strength of selling AI-permission control to enterprises that mostly cannot yet tell an employee's activity from an agent's.
- *The JC*: An eight-month-old became the first patient anywhere to receive a Hebrew University-developed gene therapy for WOREE-syndrome epilepsy, with an FDA application expected within months.

Culture, Religion & Society

- *Jerusalem Post*: The Antiquities Authority began excavating a 400,000-to-250,000-year-old Acheulo-Yabrudian cave outside Fureidis, exposed by Ayalon Highways roadwork near Zichron Yaakov.
- *Israel Hayom*: Tel Aviv's Pride parade goes ahead Friday after a week of missile fire and a foreign boycott push that organizers say even turned the drag performers they once paid to fly in against them. With overseas tourism gone, the event is running on domestic crowds — the "pinkwashing" charge has reached the point of telling Israelis they cannot celebrate their own.
- *Forward*: Netanyahu named a street for Abraham Sutzkever, the Vilna partisan who led the "Paper Brigade" rescuing Jewish manuscripts from the Nazis and was the lone Jewish witness the Soviets called at Nuremberg — the first such honor in Israel, which kept him at arm's length for choosing Yiddish over Hebrew.
- *JNS*: A practicing mohel answered a Daily Mail column recycling anti-circumcision claims, walking through the complication data and the deliberate conflation of brit milah with FGM — the medical-respectability gloss is the newer vector in a campaign whose endpoint is a ban.

Developments to Watch

Judea & Samaria

- **Sixty-one communities head to the cabinet** — A plan to fund sixty-one Judea and Samaria communities is set for cabinet approval, the table's answer to the six-capital sanctions. Paris has named E1 as its next trigger. Approving construction the same week the sanctions widen sets the building works and the lists on a collision.

Northern Front (Lebanon / Syria)

- **Erdogan moves the line to Beirut and Damascus** — Erdogan told his parliament that “security begins in Beirut and Damascus” and warned against “adventures” in the Eastern Mediterranean. Cyprus signed a defense pact with France. A Turkish red line drawn at Israel’s Lebanon and Syria strikes turns the next Beqaa raid into a NATO-member grievance Washington has to manage.

Regional Axis (Iran, Houthis, Militias)

- **The oil blockade becomes the war** — Trump says the US military is pulling “millions of barrels every night” out of Iran. Treasury sanctioned a fresh China-and-Hong-Kong network moving the regime’s crude.
- **The Gulf counts a second night of debris** — Iranian fire put a child in the hospital in Bahrain, shut Kuwait’s airspace, and sent twenty missiles at Jordan. Waltz flew to the UAE and Bahrain this week, the first senior American in the Gulf since the war reopened.
- **The IRGC raises the price of the paper** — Tehran wants cash in hand as a condition of any interim outline, its envoy telling the Security Council no deal holds “under threats.”

Diplomatic & Legal

- **The IAEA board files the lockdown pretext** — The thirty-five-state Board of Governors passed the US-backed resolution demanding Iran declare its enriched stockpile and readmit inspectors. Tehran denounced it within the hour. Moscow and Beijing have shut the Security Council route. The censure is the last formal step before the E3 must decide whether to invoke snapback, the one trigger Russia cannot veto.
- **Three dead Indian sailors pull Delhi in** — India summoned a senior US diplomat over the strike on the Settebello that killed three of its nationals. It is the second tanker disabled in two days.

Home Front & Politics

- **The Basic Law vote arms the dissolution deal** — Torah Study cleared its preliminary reading, the haredi parties’ price for the October 20 election Netanyahu agreed to schedule. Last night’s vote is the lever that sets the dissolution in motion. The kashrut and daycare bills are the remaining installments before the Knesset votes to send itself home.

The regional order is being redrawn underneath a war that has captured everyone’s attention. The deals that will outlast this round are the ones signed while the cameras pointed elsewhere. Israel is winning the front it can see and losing ground on the three it cannot afford to stop watching.

Shabbat shalom!

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ABOUT MITZPE INSTITUTE

Mitzpe Institute is an intelligence and strategy organization focused on Israeli security, diaspora threat assessment, and the strategic challenges confronting the Jewish people and the West. We produce daily intelligence, forensic analyses, strategic assessments, and tactical briefings read by policymakers, military leaders, and institutional decision-makers across more than 90 countries and all 50 US states — from the Knesset and the US Congress to allied governments, major policy institutions, and Jewish organizational leadership worldwide.

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