



Forensic intelligence for those who act.

READER EDITION

June 21, 2026

ISRAEL BRIEF

Sunday, June 21

The deal Israel never wrote is now enforced against it on every front — Hormuz reclosed, the talks turned on Lebanon, the bloc past 61, and two more soldiers buried under the fifth ceasefire.

◇ URIEL ZEHAVI

THE BOTTOM LINE Tehran has solved its recruitment problem by removing the recruit's conviction from the equation. As we mentioned when this surfaced last week, Iran no longer needs an ideologue willing to die for the cause when a payment app and a teenager with a phone will shoot up a shul and upload the footage for verification. The arrest is real and worth something, but it answers the wrong question. Jabbi is convictable, a Pearson cell can hold him, and a Hamburg court can try the surveillance man. The Quds Force desk that wired the money sits outside the reach of every warrant in this paragraph [the entire design — the trigger-puller is catchable and the paymaster is not] and was just handed access to new funding [thanks, Trump!]. Until a Western government treats the IRGC as the foreign intelligence service running these files rather than the off-screen sponsor of isolated hate crimes, the synagogue stays a contract Tehran can re-let on the next teenager's phone — at the standing cost of officers like Constable Pinizzotto and the congregants who pray behind guards their own communities continue to pay for.

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Shavua tov, friends.

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So much for a quiet Shabbat. Tehran shut Hormuz by press release and sent its delegation to Switzerland to make Lebanon the price of the nuclear talks. Vance reminded Jerusalem whose funding its weapons run on. And the fifth ceasefire of the war arrived the way the last four did — via a foreign podium. And now there were five soldiers killed enforcing it. The home front kept pace. Two weekend polls tied Eisenkot with Likud and put the opposition bloc at 61.

Flash Brief

- **A commander falls:** A Hezbollah drone kills Lt. Col. Dor Ben Simhon ז"ל and three of his men near Kfar Tibnit, and Sgt. 1st Class Nir Ben Ari ז"ל falls in the ridge assault that follows, as the fifth ceasefire arrives through Tehran. *See The War Today.*
- **Hormuz, by press release:** Tehran declares the strait shut over the Lebanon strikes and threatens missiles, but CENTCOM counts 55 transits and says plainly Iran does not control it — the lever is the oil price, not the traffic. *See The War Today.*
- **Lebanon goes first:** Iran's senior delegation lands in Switzerland anyway and makes the all-fronts ceasefire — Lebanon included — the price of opening the nuclear file at all. *See The War Today.*
- **A deniable arm:** The IRGC has stood up covert Iraqi cells funded by the windfall the deal released, already firing drones at Gulf states hosting US forces. *See The War Today.*
- **The weapons line:** Vance reminds Israel's ministers most of their defensive arms come through US funding, the warning folded inside the reminder. *See Israel and the World.*
- **Bloc clears 61:** Two polls tie Eisenkot's Yashar with Likud as the coalition slides to 49 and Trump tells Netanyahu to be "more rational." *See Inside Israel.*
- **Do it again:** The High Court declines to annul Rabello's election as Comptroller and orders a clean third Knesset vote the coalition cannot whip. *See Inside Israel.*
- **The convoy comes:** A released deserter draws dancing crowds at Prison 10, a policewoman is hospitalized, and Agudah plans a vehicle convoy of thousands. *See Inside Israel.*
- **Sa'ar cuts Brussels:** Israel severs contact with EU chief Kallas until she retracts an apartheid comparison her own ambassador will not put on the record. *See Israel and the World.*
- **The listing lands:** Guterres keeps Israel on the UN sexual-violence blacklist and calls hostage testimony "unverifiable," processing a Kristof column the NYT is now investigating. *See Israel and the World.*
- **One Iranian network:** Toronto, Melbourne, and Hamburg charge three nodes of the same paid-teenager model Tehran runs against Jewish targets. *See Israel and the World.*

THE frozen-asset clause is the part of the deal doing the quiet damage. The same waivers that bought the nuclear freeze released the cash, and the cash is already rebuilding what the strikes took apart — a deniable IRGC

network in Iraq, a Hezbollah injection clearing on schedule, the axis reconstituting underneath the ceasefire that was supposed to end it. Israel is bound to a page it never got to write and cannot afford to tear up, and it is asking voters to trust it with the next round.

The War Today

BATTALION COMMANDER AND CREW FALLS AND THE FIFTH CEASEFIRE ARRIVES BY FOREIGN WIRE

A Hezbollah attack drone struck a Battalion 52 tank near Kfar Tibnit just after midnight Friday, killing four men of the 401st Armored Brigade, among them the battalion's commander, Lt. Col. Dor Gedalia Ben Simhon ז"ל, 32, married and the father of two daughters and the fourth officer to lead that battalion in this war either wounded or killed. The army answered with more than eighty strikes across southern Lebanon and the Beqaa, hitting command centers in Nabatieh and the valley with terrorists inside, then a US-and-Qatar channel brokered the halt through Tehran rather than through Beirut and set it for 4 p.m. The IDF told reporters it keeps operating unless ordered otherwise and will not leave the ten-kilometer security zone Adraee mapped out a day earlier. Netanyahu had promised a "heavy price" hours before the quiet arrived. The push onto the ridge that followed killed Sgt. 1st Class Nir Ben Ari ז"ל and wounded thirteen more, two seriously. The complex is the nerve center of Hezbollah's Badr Division, built over a decade with Iranian money and carved into rock the group reportedly meant to defend by blowing the Qaraoun Dam and flooding the Litani basin to halt the advance. By Saturday afternoon the orders had narrowed to hold fire while troops sat in operational control of the Ali al-Taher ridge with dozens of Hezbollah fighters trapped below, and Qassem told his followers there was no reason to surrender.

ASSESSMENT

Five "ceasefires" now, and Israelis learned of this one the same way they learned of the last four — from a foreign official reading out a deal, which is what it looks like when the decision to stop firing has migrated off Jerusalem's desk entirely [the "senior official" relaying that there is "nothing new" shows us that there was nothing Israel got to write]. The clause that ends the war "on all fronts" is being enforced as a one-way fire-control regime. Hezbollah drops the explosive drones and reaches for the old buried charges precisely because the army's reply has been cut to threat-removal, leaving a force that struck eighty targets one night holding its fire the next over a line Hezbollah's own patron certifies. Without a change in methodology in Jerusalem, the narrowed rules of engagement leave the next casualty event nearly unanswerable.

IRAN CLOSES HORMUZ TO TOLL THE DEAL IT SIGNED, BENDS THE TALKS TO LEBANON

Tehran's central command announced Saturday it had shut the Strait of Hormuz again, days after CENTCOM lifted the blockade and dropped the threat level on the signing, casting the IDF's Lebanon strikes as a breach of the

memorandum and warning it might fire missiles at Israel that night. Friday's first technical round at the Qatari-owned Burgenstock resort slipped, but Iran sent its senior delegation to Switzerland over the weekend regardless — its parliament speaker, its foreign minister, and the central-bank and oil chiefs alongside them. And the Iranians put Lebanon first on the agenda, demanding Washington enforce the deal's all-fronts ceasefire against Israel before the nuclear file opens at all. Hegseth said Washington would reimpose the blockade and resume strikes if Tehran does not perform.

ASSESSMENT

A regime that can spook the strait with a press release, time the scare to an Israeli operation in Lebanon, and pocket the frozen funds before a single inspector arrives was handed the enforcement lever, and it is testing how often it can pull it [the "60 days" Trump keeps invoking is the window built so the dilution never quite happens]. The strike-restart threat Hegseth keeps naming is the only clause Washington left itself, and Tehran has already discovered it can keep its seat at the table, spook Hormuz, and hog tie Washington into bullying Israel. And all this without so much as forfeiting a cent.

IRAN STANDS UP COVERT IRAQI CELLS TO REARM ITS EASTERN ARM

The IRGC has built new clandestine cells in Iraq to strike Gulf states hosting American forces, routing around the established militia networks to stay below detection. Three or four cells of roughly ten elite Iraqi Shi'ite fighters each launched at least seven drone attacks from desert sites near Basra and Samawa against targets in Kuwait, Saudi Arabia and the UAE between late April and mid-May. The bypass tracks other pro-Iran factions in Iraq signaling readiness to disarm — the Guard building a deniable arm precisely as its visible proxies look to stand down. Defense Ministry Director General Amir Baram named the eastern arena the most sensitive security region right now, warning that the Iraqi militias and the Yemeni Houthis retain the reach to penetrate Israel on the ground despite the distance.

ASSESSMENT

The deal that froze the nuclear and missile demands also freed the money, and the released funds are reconstitution capital — the Guard is spending its windfall on a new, deniable Iraqi arm in the same fortnight Hezbollah expects its own cash injection to clear. This is what reconstitution looks like when the strikes stop — a fresh arm built underneath the proxies the strikes degraded, designed so the first attack arrives without a return address. The eastern arena Baram flags is the front no clause of the memorandum addresses, and it is the one the IRGC is quietly resourcing while everyone reads the page on Hormuz.

Inside Israel

EISENKOT TIES LIKUD AND THE OPPOSITION BLOC CLEARS SIXTY-ONE

Two polls over the weekend put Gadi Eisenkot's Yashar level with Likud, 21 to 21 in Maariv and 23 to 23 in Zman Yisrael, the first time the former chief of staff's party has caught Netanyahu's. Both surveys hand the opposition bloc a

Knesset majority once the Arab parties are counted, 61 against a coalition that has slid to 49. Likud has lost ground every week since Roaring Lion. Bennett — now merged with Lapid and bleeding from the left as Eisenkot rises — used a Jerusalem appearance to lay out a first-term program built around a written constitution [a fantastic idea, but good luck with it] and a state commission of inquiry into October 7, and pressed Eisenkot at a faction meeting to stop splitting the bloc. A weekend poll found that were the two to run apart, Bennett would hold fifteen seats and Lapid would miss the threshold entirely. Eisenkot launches the Yashar campaign June 30 in South Sharon. From Washington, Trump told an Israeli broadcaster he would “most likely” endorse Netanyahu but wanted to see the field first, and that Netanyahu “needs to be more rational,” the softer-touch line he has been running all week.

ASSESSMENT

Eisenkot is the security candidate the 1977-and-after pattern always produces once the security event has happened, and more than just one major security event has happened. Trump conditioning his endorsement on Netanyahu becoming “more rational” is the asset turning into the liability in real time [the man who could manage the Americans, now publicly told to manage himself]. The coalition is fighting an election on the one axis it cannot win and burning its remaining weeks on a draft fight that moves the same number the wrong way.

THE STREETS CELEBRATE RELEASED DESERTERS AS THE HAREDI REVOLT ADDS A CONVOY

The arrest of haredi draft-dodger Aviel Cohen near Netivot turned Military Prison 10 at Beit Lid into the protest’s fixed point, and his release before Shabbat drew crowds dancing outside the gates, some Breslov demonstrators blocking roads and chanting “die today” and “scum” at police clearing them. The Jerusalem light rail suspended service between the central station and Mount Herzl as crowds massed near the prison. On Route 4 by Bnei Brak a Jerusalem Faction demonstrator wrenched a plainclothes officer to the ground hard enough to hospitalize her, and a 26-year-old was remanded. Agudat Yisrael’s Hamodia announced a mass vehicle convoy of “thousands” heading for Prison 10 this coming week. Shas sent Malkieli and Mishraki to demonstrate outside the prison and issued a release crediting Deri with Cohen’s freedom, then pulled back under public backlash. A weekend poll holds at 44 percent of the public, 48 of traditional voters, more supportive of sanctions on evaders.

ASSESSMENT

Ninety thousand men outside the system — refusing to serve their country like everyone else. And their leaders are now organizing a vehicle convoy to honor men jailed for refusing the call-up the rest of the country answers. There is no version of that picture that helps the parties that depend on it nor that isn't a chillel hashem. A policewoman in the hospital and "die today" shouted at officers is what the absence of a statute leaves the street free to do, the same governmental posture that costs the organizers nothing telling the next crowd what the next blockade will cost it [also nothing]. Shas trying to bank the release as a party win is, it would seem, fully out of any remnant of piety. Every blocked highway hands the sanctions case the votes the coalition cannot spare, and the only direction this fight moves the number is the one already on the board [maybe it's Bibi, who like his old friend, is just tired of winning?].

SOHLBERG TELLS THE KNESSET TO VOTE THE COMPTROLLER OVER AGAIN

After six hours of argument on seven petitions, the High Court declined to annul Michael Rabello's election as State Comptroller and instead handed the Knesset a way out: do it again. "In simple Hebrew: do it again," Deputy President Sohlberg said, citing the votes recorded contrary to the legal adviser's secret-ballot instruction in a chamber where Rabello — Netanyahu's longtime attorney — beat retired Justice Elon only on the second round. The Court gave the respondents, the Knesset and Likud and the prime minister's attorneys among them, just through today to respond.

ASSESSMENT

Sohlberg gave the coalition the narrowest possible off-ramp and the coalition still has to drive onto the floor to take it, which is the bind — a third vote means rounding up the same haredi votes that are presently being withheld over the draft, and they were never going to come free the first time, let alone now. Whoever holds the Comptroller's pen when the election is called audits the government that comes out of it, which is the whole reason the seat was worth contesting this hard this late. The coalition's problem now is that "in the open" and "with the haredim boycotting the floor" do not fit in the same maneuver.

Israel and the World

VANCE TURNS THE DEAL'S DEFENSE INTO A WARNING OVER ISRAEL'S WEAPONS

VP Vance, from the White House podium, told Israeli cabinet ministers who criticized the deal to "wake up and smell the reality," called Trump "the only head of state in the entire world who is sympathetic to the nation of Israel at this moment," and reminded them that most of Israel's defensive weapons come through US funding — though Vance isn't really accurate in his claims. Trump ran the same pressure on a personal track, reviving a two-year-dormant grudge that Israel pulled out of the 2020 Soleimani operation at the last minute, then reversing on Friday at the Air Force One unveiling to call Netanyahu a "warrior prime minister" who deserves credit, and telling Israeli television it was "very likely" he would back Netanyahu at the next election once he sees the challenger. Netanyahu has not answered any of it, calculating that the unread framework collapses on its own and the next window on Iran opens

after the November midterms. The instruction to the IDF is to prepare to act against Iran alone.

ASSESSMENT

Vance is trying to sell the surrender as a grand deal, and failing. So he's trying to make inroads where he can. In this instance by telling Israel what its weapons are contingent on, and that weapons line is the part that was always underneath the permission-layer migration we have been tracking. Vance grants Israel the right to self-defense in Lebanon in one breath and brands the Beirut strikes the thing wrecking the breakthrough in the next, which is the offer functioning as the leash. Trump's Friday praise costs nothing and reverses nothing — the grudge is the message, the "warrior PM" is the management of the President's own embarrassment, and the election endorsement arrives conditioned on a challenger he has not yet seen.

✠ Dossier: *Field Dossier: The Permission Layer* — Vance naming US weapons funding as the price of Israel objecting to the deal is the permission-layer thesis this Dossier builds in full — the US real-time veto over Israeli action, traced from the June 8 stand-down through the arms-export leverage the memorandum now makes explicit.

SA'AR SEVERS ALL CONTACT WITH THE EU'S TOP DIPLOMAT OVER AN APARTHEID SMEAR

Israel cut off its foreign-policy channel to Brussels. Sa'ar announced he would sever all contact with EU foreign-policy chief Kaja Kallas until she retracts what he named a "blood libel" — a closed-door comparison of Israel to apartheid-era South Africa, reported off a leaked account of a meeting with Mexican officials, which Kallas has declined to deny, clarify, or condemn. Kallas answered that "dialogue is the foundation of diplomacy." The break lands amid a months-long Kallas push for bloc-wide sanctions on Israel and the same week Norway moved a bill to criminalize all trade with Israeli communities in Judea and Samaria and Jewish neighborhoods in Jerusalem, its foreign minister calling them "colonies" that undermine a Palestinian state. The EU's own ambassador to Israel, pressed on the remark, retreated to "I simply cannot comment on an unofficial quote from an anonymous official" and insisted Brussels holds no position that Israel is an apartheid state.

ASSESSMENT

A center-right Estonian whose 2024 appointment Jerusalem welcomed as the corrective to Borrell reached for the same vocabulary inside a year. The word is the propaganda term that did the work six governments needed when they sanctioned Smotrich on a UN panel's settler-violence finding, laundered the same way until it surfaces from a foreign ministry scrubbed of where it started. Sa'ar declining to keep talking until the term is withdrawn is the rare answer that costs Brussels something, because the EU's own ambassador will not put the apartheid charge in the bloc's mouth on the record [Mann could not commit to a quote he was clearly briefed to walk back]. Norway's bill is the same campaign reaching for the instrument that needs no unanimity.

GUTERRES LISTS ISRAEL FOR SEXUAL VIOLENCE AND CALLS OCT 7 UNVERIFIABLE

Guterres kept Israel on the annual conflict-related sexual-violence blacklist alongside Hamas, ISIS and Boko Haram, and his children-in-conflict report attributed 12,445 “grave violations” to Israel and the Palestinian territories, the highest count of any theater the UN examined in 2025. Danon confronted Pramila Patten, the secretary-general’s special representative, at Friday’s flagship event marking the day against sexual violence in conflict, telling her she never reviewed the evidence and demanding she resign before Vanessa Frazier cut in to defend the findings. The same institution that listed Israel told Gilboa-Dalal, who in November described being sexually assaulted in a Hamas tunnel and ordered at knifepoint to stay silent, that survivor testimony “cannot be verified.” Nick Kristof’s May column accusing Israeli guards of training dogs to rape Palestinian prisoners is now itself the subject of a New York Times inquiry into undisclosed donors he wrote about. The privately funded Civil Commission’s 298-page “Silenced No More,” built on more than 10,000 photographs and 430 interviews, sits unread on the same desks.

ASSESSMENT

The listing is the laundering cycle run to completion — a columnist’s allegation against Israeli prison guards published in May, processed through a UN annex in June, and arriving on European foreign-ministry desks scrubbed of the fact that no UN body verified a word of it, while the 10,000 photographs documenting what Hamas actually did to Israeli women are the evidence these offices cannot find the time to read. We flagged this annex three weeks ago as a drafted instrument waiting on a surface date, and it surfaced exactly as built: Israel named beside the men who ran the rape camps it is accused of being, on a finding its own author concedes she never checked. The on-ramp to a UN listing turns out to be a NYT opinion writer the paper is now investigating for the same integrity his column spent itself impugning [Guterres has six months left to leave, and this is the legacy he is choosing. The history books will not be kind.].

TORONTO, MELBOURNE AND HAMBURG CHARGE THREE NODES OF ONE IRANIAN NETWORK

Toronto police arrested Zara Jabbi, 19, at Pearson airport, the suspect named at large last week in the U.S. consulate shooting that ties into the same criminals-for-hire wave Chief Demkiw has linked to shootings at the city’s synagogues and Jewish schools. A Toronto officer was killed serving a warrant in that file eleven days ago. The same week, Melbourne charged a third masked offender, 20, in the December 2024 arson that gutted the Adass Israel Synagogue, an attack Canberra has already attributed to the IRGC. And in Hamburg, a Danish national of Afghan origin goes on trial for surveilling Jewish targets on Quds Force orders, including Central Council president Josef Schuster and the head of the German-Israeli Society, intelligence gathered for planned murders and arson. Three jurisdictions, one method: a regime that buys the trigger-puller and films the proof of work before the fee clears.

ASSESSMENT

Tehran has solved its recruitment problem by removing the recruit's conviction from the equation. As we mentioned when this surfaced last week, Iran no longer needs an ideologue willing to die for the cause when a payment app and a teenager with a phone will shoot up a shul and upload the footage for verification. The arrest is real and worth something, but it answers the wrong question. Jabbi is convictable, a Pearson cell can hold him, and a Hamburg court can try the surveillance man. The Quds Force desk that wired the money sits outside the reach of every warrant in this paragraph [the entire design — the trigger-puller is catchable and the paymaster is not] and was just handed access to new funding [thanks, Trump!]. Until a Western government treats the IRGC as the foreign intelligence service running these files rather than the off-screen sponsor of isolated hate crimes, the synagogue stays a contract Tehran can re-let on the next teenager's phone — at the standing cost of officers like Constable Pinizzotto and the congregants who pray behind guards their own communities continue to pay for.

Briefly Noted

Frontline & Security

- *Jerusalem Post*: The Civil Administration pulled an Israeli citizen out of central Ramallah overnight after a friend drove him into Area A and abandoned him. [With friends like this...] Entry into Area A remains prohibited and life-threatening, a standing fact the periodic rescue keeps re-teaching.
- *Arutz Sheva*: The State Attorney's Office indicted two Negev Bedouin men for running more than 170 drone crossings into Gaza carrying drugs and cigarettes, some of the airframes built from IDF parts. The smuggling corridor is the same penetration architecture a hostile cell uses to move anything else across the same fence.

Diplomacy & Geopolitics

- *Jewish Insider*: Albanian Prime Minister Edi Rama pinned the daily protests against a Kushner-Trump coastal development on a three-year Iranian cyber campaign, the same Tehran operation that severed Albania's digital services and its diplomatic ties in 2022. The regime that lost the kinetic war is still running the disinformation front it can open anywhere it finds a "settler-aligned" target — here, a luxury resort.
- *Jerusalem Post*: Paris police arrested 20 as demonstrators defied a court-upheld ban on an NCRI rally against Iran's executions, the prohibition landing hours after Barrot and Araghchi spoke by phone. France insists the timing was coincidence — a denial worth exactly what it costs to issue.

Public Diplomacy & Media

- *Jerusalem Post*: A Qom court sentenced singer Parastoo Ahmadi and eight other artists to 74 lashes each, plus two-year travel and performance bans, for a hijab-less concert streamed on YouTube.
- *Ynet News*: Former Mossad chief Yossi Cohen gave Le Point an unusually detailed account of the pager operation, the Iran nuclear-archive raid, and

the Natanz sabotage. The retired spymaster narrating live operations is itself a perception move, not just a memoir.

- *Times of Israel*: Lucas Gage, a white-nationalist influencer who spent fourteen years pushing Jew-hatred online, claims he left the movement after watching the far-right blame Israel for Charlie Kirk's murder.
- *JNS*: Aisha Wahab, the California state senator who calls Israel's war on Hamas a "genocide," led the field at roughly 42% to advance in the special election for Eric Swalwell's House seat. The vocabulary that was a primary liability two cycles ago is now the front-runner's position.

Domestic & Law

- *Ynet*: The State filed a two-million-shekel civil suit against the four PFLP terrorists who kidnapped and murdered soldier Moshe Tamam ז"ל in 1984, to claw back the bereavement payments the Defense Ministry has made to his parents for forty-one years. The principle is that the men who did the killing carry its costs, not the public that has been paying them.

Economy, Tech & Infrastructure

- *The JC*: Tel Aviv ranked the world's fourth-strongest startup ecosystem, behind only Silicon Valley, New York and London, at an estimated \$250 billion and up 162 percent in five years. Three years of war, and the capital question still answers in Israel's favor.
- *Globes*: A BP-SOCAR-NewMed consortium will send a seismic ship in September to begin Israel's first active offshore gas exploration since 2022, after the war and the Egypt export fight pushed the license back two years.
- *Jerusalem Post*: Israeli cyber and counter-drone firms are running security for the FIFA World Cup across the US, Mexico and Canada, one of them calling the tournament the largest digital battlefield in history.

Culture, Religion & Society

- *JTA*: Four years after the boycott fight that split it from its American parent, Ben & Jerry's Israel rolled out "Milk and Honey," built from dairy and honey of Gaza-border kibbutzim hit on October 7 and studded with chocolate Stars of David. The Israeli operation now carries the brand its founders tried to keep out of Judea and Samaria, and points the proceeds at the communities those founders wrote off.
- *Jerusalem Post*: A Haifa court issued an immediate restraining order blocking an Israeli auction house from selling original yellow stars and liberation certificates, after the Yad Ezer La-Haver association — which runs Haifa's Holocaust museum and a survivors' shelter — argued the artifacts would vanish into private hands.
- *Times of Israel*: A University of Haifa study of mud cores drilled off the Carmel Coast reconstructs 4,000 years of climate swings and finds that ancient Levantine communities adapted to repeated drought, surviving where the standard story has them simply collapsing or moving on.

Developments to Watch

Judea & Samaria

- **The army's own war-crimes rulings come due** — Military Advocate General Itay Offir will hand down his first Gaza decisions since taking office in November, the World Central Kitchen strike and the March Red Crescent incident among them, in the coming weeks.

Northern Front (Lebanon / Syria)

- **The Washington round opens Tuesday on a contested line** — Rubio and Aoun agreed the next Israel-Lebanon talks begin in Washington Tuesday, and Berri is arriving with a fresh withdrawal framework while Netanyahu vows to hold the ten-kilometer zone Adraee mapped. Beirut sits down asking for the ground the army is still fighting to keep, and the gap between Berri's paper and the line under it is what the room has to close in 48 hours.
- **The drone answer is weeks out, not fielded** — IAI's chief says a counter to Hezbollah's explosive drones is "weeks, not months" away, run through MAFAT across detection, identification, and kill.

Gaza & Southern Theater

- **The Board of Peace moves without Hamas's consent** — A source close to the US-backed Board of Peace says Hamas will not be handed a veto over the security and economic tracks now advancing, and that near-term developments are coming. Historically, Hamas figures out how to wiggle around that. The plan moves on the premise that Hamas controls less of Gaza than it did, which is not really enough to make a meaningful difference in their actions.

Regional Axis (Iran, Houthis, Militias)

- **The mediation reconvenes in Cairo today** — With the Switzerland technical round suspended over the Lebanon strikes, the Pakistani, Saudi, Turkish, and Egyptian foreign ministers sit down at el-Alamein today to keep the US-Iran track alive. The 60-day interim clock runs whether or not the principals meet, and depends on mediators with no power to bind Tehran.
- **The inspection access the deal rides on is already disputed** — Witkoff told Congress a side letter invites Grossi and US inspectors to Iran's enriched-material sites, and Tehran's foreign ministry immediately denied issuing any such invitation. The surrender doesn't seem to have anything to say on the matter except that the enriched stock the war was meant to take stays exactly where it sat.

Diplomatic & Legal

- **Treasury pre-loads the Lebanon table with sanctions** — Washington sanctioned Hezbollah-linked Lebanese officials Thursday, its first such action since the Iran memorandum. Pressure for the negotiations, at most.

- **Paris holds the snapback veto over Iran's missiles** — Barrot put France on the record that no UN sanctions lift on Iran without French sign-off, and not until any final accord covers Tehran's ballistic-missile program and its proxies.
- **The prosecutor behind the warrants is sidelined twice** — Britain's Bar Standards Board suspended ICC prosecutor Karim Khan this week, mirroring the court's own June 8 suspension, and the Assembly of States Parties votes July 24 on removing him. The arrest warrants against Israeli leaders wore Khan's signature, and a two-thirds vote against him reopens every question about how those warrants were sought.

Arens called security the beating heart, and the beating heart is what cracked the coalition that tried to make a daycare subsidy and a draft exemption the central questions. The enforcement lever sits in Tehran's hand, the weapons line sits in Washington's, and the only actor still setting its own tempo is the IDF holding a ridge over Hezbollah fighters who were told there was no reason to surrender. A government that cannot write the page binding its own northern border is now asking voters to trust it with the next war, and the polls returned the answer before the ballots printed.

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