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ISRAEL BRIEF

Tuesday, August 18

Kushner leaves Jerusalem with Israel's sequence and the pull-back still open — and Likud's members spare all three men the prime minister's circle marked.

◇ URIEL ZEHAVI

THE BOTTOM LINE Karmily put his finger on the thing no aliyah program has been able to buy: “everybody loves Israel, supports Israel, contributes money to Israel,” and when it comes to moving, “you support it but you don’t want people to actually move there.” What stops an American family is leaving the community behind, and these eight took the community with them, down to the shul. No ministry can subsidize that, and it only works where a community is tight enough to move eight families at once. Whether this was eight families or the first eight gets decided in Great Neck.

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Israel Brief: Tuesday, August 18

Kushner leaves Jerusalem with Israel's sequence and the pullback still open — and Likud's members spare all three men the prime minister's circle marked.

ISRAEL'S terms for Gaza are now the American ones. Weapons get surrendered for destruction first, and nothing gets rebuilt in the Strip until Hamas is disarmed. Ten months of ceasefire have produced no handed-over weapon and no dissolved formation, so what is left to argue is the handover itself and how far back the army goes in the unlikely event it happens. Tehran spent yesterday denying it has any channel to Washington and announcing it won a war Jerusalem reads it as preparing to widen.

FLASH BRIEF

- **Gaza:** Netanyahu and Kushner settle Israel's sequence — weapons destroyed first, and nothing rebuilt until Hamas disarms. *See The War Today.*
- **Iran:** Israeli officials read Tehran as preparing to widen the war, and two drones hit Kurdistan's leadership overnight. *See The War Today.*
- **Sultan Yacoub:** Israel recovers the last of its missing from the 1982 battle, forty-four years on. *See Briefly Noted.*
- **Likud:** Five ministers fall off the slate, and the three men Netanyahu's circle marked all place. *See Inside Israel.*
- **Judea and Samaria:** Katz gives the army two weeks to hand policing of Israelis to the police, and Ben-Gvir names his price. *See Inside Israel.*
- **Upper Galilee:** Kibbutz Yiftah is pouring foundations for twenty-two new families on a border Hezbollah held two years ago. *See Inside Israel.*
- **Saudi Arabia:** The last of the Jew-hate is out of the kingdom's 136 school textbooks this year. *See Israel and the World.*
- **Campuses:** Reed settles a Jewish student's harassment complaint, and nine more small colleges are still in dispute. *See Israel and the World.*
- **Great Neck:** Eight Persian Jewish families move to Israel together, into one neighborhood. *See Israel and the World.*
- **Hormuz:** The Revolutionary Guards seize an Emirati-owned tanker, and Tehran names six carriers hauling for American forces. *See Developments to Watch.*

Inside Israel this week's arguments are about what the next government inherits. Katz has given the army two weeks to hand policing of Israelis in Judea and Samaria to the police, and Ben-Gvir has attached a price — the Border Police division, and the authority to sign administrative detention orders himself. None of it takes effect before 27 October, which makes the next ten weeks a fight over where people stand when the counting is done. Trump spent the weekend showing what declining an American ask costs, and Seoul is paying it this week.

The War Today

Netanyahu Puts the Weapons Before the Withdrawal and Kushner Agrees

Netanyahu spent close to four hours with Jared Kushner in Jerusalem yesterday, one-on-one first and then with Nickolay Mladenov, Tony Blair, Mike Huckabee and American military officers in the room. Shin Bet chief David Zini and Military Intelligence chief Maj. Gen. Shlomi Binder took them through what Israel holds on Hamas's rebuild, including Israeli intelligence that Turkey is paying for it. The sequence that came out is Israel's. Hamas surrenders its weapons for destruction to Maj. Gen. Jasper Jeffers, the American who commands the international stabilization force, and nothing gets rebuilt in Gaza until Hamas is disarmed across the Strip. Two working groups now exist — one on disarmament and demilitarization, one on sewage and drinking water, after the room was warned about disease spreading and about what is going into the groundwater and the beaches.

Israel signed Trump's twenty-point plan, adopted last November as Security Council Resolution 2803, which destroys every weapon in Gaza permanently under independent monitors. The Board of Peace, the American-led transitional body Trump chairs over postwar Gaza, published its own fifteen-point roadmap on 30 July. Hamas accepted that one. Israel never signed it, and it leaves the same weapons in Palestinian hands. Kushner said afterward that weapons could start coming out inside thirty days and tunnels start being filled in the next sixty to ninety days, that Washington will not let Gaza be rebuilt before demilitarization, and that nothing in the plan restricts Israel against an imminent threat. An Israeli official gave the shorter version. "There was an approach that wanted to begin with pilot programs, but now there are no pilots. Hamas must demonstrate the destruction of weapons." Israel also told the Americans it won't take a handover staged with weapons that don't work.

Netanyahu told Kushner what he made of the Cairo meeting he had flown in from. "These are the architects of October 7." Kushner didn't answer. What went unsettled is the pullback. The Board is weighing dropping its sector-by-sector plan for a single wholesale disarmament, verified in one pass, and Israel would then go back past the Red Line on Trump's September map all the way to the perimeter of Gaza. That change would need Hamas's agreement and would run well past the October election. Israeli officials denied afterward that anything had been agreed about stopping targeted killings, thinning the force or leaving the Yellow Line.

The order to the troops went out hours after the meeting broke up. Stop pushing the Yellow Line west, and photograph every Hamas violation of the ceasefire, personal phones permitted where necessary. Overnight a Hamas charge went off in the Yellow Line area in northern Gaza, and gunmen fired into it. Nobody was hurt. Israeli forces struck the area immediately and called it a violation.

ASSESSMENT

Netanyahu has the sequence he wanted. How the weapons actually change hands, if they do, still has two versions — Hamas surrendering them to Jeffers for destruction, or Hamas handing them to the technocratic committee and the stabilization force with Jeffers supervising. The twenty points and the fifteen points are being argued again one layer down. Hamas has a few weeks to show something real, and a Board of Peace official says that if it doesn't, Israel gets international backing to disarm it. [So a rifleman on the Yellow Line holds his ground, doesn't advance, and films Hamas breaking a document Israel never signed. On his own phone. Great OpSec. Somebody buy the man a camera.]

Field Dossier: [The Gaza Reconstruction Trap](#) — The Dossier's argument is that five reconstructions have each ended in rearmament because the model is built to produce that, which is the claim underneath Israel holding every brick in the Strip against the destruction of every weapon and Kushner saying Washington will not let Gaza be rebuilt before demilitarization. ##### Israel Reads Tehran Preparing to Widen the War It Says It Won

Israeli officials are seeing signs that Tehran's hardline leadership is preparing to widen the Iran war, which opened when Iran closed the Strait of Hormuz at the end of February and has not ended since. What they expect it to reach for is energy infrastructure, shipping and Washington's partners in the region. Overnight two drones came out of Iranian territory and hit the personal office of Masrour Barzani, prime minister of Iraq's Kurdistan Regional Government, and the home of the region's intelligence chief. The Kurdish counter-terrorism directorate identified them as Hadid-110s and put the launch on the Iranian side of the border. Iraq's prime minister has ordered an investigative committee. Tehran and its Iraqi militias have put more than a thousand attacks into Kurdistan since February, into a region that hosts American troops, foreign oil companies and Iranian exiles.

Iran condemned the strike and warned the Kurds about somebody else. Esmail Baghaei called it a highly suspicious development requiring vigilance. Araghchi wrote that nothing justifies the attack and that "Kurdish friends should be vigilant against false-flag ploys to sow discord between neighbors."

The sixty-day memorandum expired Monday with nothing signed and Trump saying he won't ask for an extension. The Guards' spokesman, Hossein Mohebbi, told Tasnim that the backchannel to the IRGC Trump described is "a delusion," and that no Iranian body is talking to the Americans at all. Baghaei called the reports of contacts through Iraqi Kurdish intermediaries and of a secret meeting in Erbil "media techniques and psychological operations used to sow discord among Iran's decision-making bodies." Araghchi told a hall of Iranian teachers today that Iran refused the ceasefire and kept fighting until Washington took one on Iranian terms. "We fought with strength and negotiated with strength, and we won the war, and we won the diplomacy."

A vessel on its way out of the strait was struck by an unknown projectile on Tuesday. It damaged the engine room and hurt one of the crew, and the Omani coast guard came for the rest. Six commodity ships made the passage on Monday against a ten-day average of eleven, three in and three out, with

no very large crude carrier and no gas tanker among them. Three crossed on Saturday. Two on Sunday. A hundred and thirty a day went through before Tehran shut the water. Araghchi says the talks with Oman are about drawing new lanes because the old ones can no longer be used, and that they are a separate question from when the strait reopens.

ASSESSMENT

Tehran spent the day denying a channel and claiming a victory. Mohebbi's denial is pointed at the Iranian decision-making bodies Baghaei says outsiders are trying to split, and neither man would be worried about that unless the bodies were splittable. A leadership that has been absorbing economic pressure since February is moving to export it, and Jerusalem's read is where: energy infrastructure, shipping, the Americans' partners in the neighborhood. Two drones into the office of a prime minister who hosts American troops is what that looks like before anybody announces it. Israel is not doing the daily fighting against Iran. It is holding at readiness with CENTCOM and preparing the option of going back without American approval.

Inside Israel

Five Ministers Fall and Netanyahu's Three Targets Hold Their Places

About 140,000 Likud members voted yesterday on the slate the party takes to the Knesset Israel elects on 27 October. The hand count ran all night. With more than 90 percent in, Energy Minister Eli Cohen has the top place behind Netanyahu, then Knesset Speaker Amir Ohana, Justice Minister Yariv Levin, Miri Regev and coalition chairman Ofir Katz. Yoav Kisch, Miki Zohar, Almog Cohen, Amichai Chikli and David Amsalem fill out the ten. Five sitting ministers are out of the next Knesset if the numbers hold: Ze'ev Elkin, Gila Gamliel, May Golan, Idit Silman, Avi Dichter. Six members go with them, Hanoch Milwidsky and Ariel Kallner and Nissim Vaturi among them.

The three men the prime minister's circle was reported to have marked for "political elimination" all placed. Tally Gotliv came twelfth. David Bitan came fourteenth, and Nir Barkat sixteenth, fewer than two hundred votes ahead of Elkin. Bitan won the one head-to-head of the night as well. His candidate for the reserved new-woman slot, Keren Bublil Atias, beat the prime minister's pick by about two thousand votes, and Yair Netanyahu had posted publicly telling members not to vote for her. The three district candidates Netanyahu backed all won. Regev and Gotliv are the only women in the top sixteen.

Turnout finished at 53.5 percent, 75,177 people, about five points down on the last primary. For the first time this millennium Netanyahu didn't extend voting hours. The day ran two hours short. Likud had planned to vote electronically and dropped it late, after cyber advisers raised the risk of foreign interference. That left the old hand count and the vote brokers who work it. Haredi organizers ran the big station at Binyanei HaUma in Jerusalem and others around the country, meeting their people at the door and handing them a filled-in recommendation slip to carry inside. Roughly 7,000 of Likud's members are haredi. The ones who talked to reporters said they will

vote United Torah Judaism or Shas in October. Yair Golan's Democrats ran their own primary a month ago on people's phones and got 86 percent. And Netanyahu holds nine reserved places inside the first twenty-nine, so a man who finished seventeenth on the ballot can sit at twenty-sixth on the list that actually runs.

ASSESSMENT

Netanyahu built this list against his own members, and the ballot is where he lost. Bitan placed, Gotliv placed, Barkat placed by a hair, and the woman Bitan backed beat the candidate the prime minister endorsed. [Seven thousand haredi members who won't vote Likud in October helped choose who Likud sends to the Knesset.] What he won, he won before anyone voted — nine reserved places, two hours off the voting day, and a hand count that runs through the brokers.

Katz Gives the Army Two Weeks and Ben-Gvir Names His Price

Defense Minister Israel Katz gave the IDF two weeks on Sunday night to put a plan on his desk. It moves civilian law enforcement over Israelis in Judea and Samaria to the Israel Police. The instruction went out at a session with Chief of Staff Eyal Zamir and Central Command chief Avi Bluth. Israeli law has never been applied there, so the army has held civil authority over the Israelis living in Judea and Samaria since 1967, and that is the authority moving to a civilian force. The same meeting agreed to move fast on regularizing the farms that operate lawfully. Katz's office added that economic penalties will be weighed against people whose unauthorized activity runs up bills for the defense establishment.

Itamar Ben-Gvir holds the national security portfolio and with it the police. On Friday he said the job belonged to the army. Yesterday he called the transfer "a significant step toward" Israeli sovereignty in Judea and Samaria, and then named a price. He wants the Judea and Samaria Border Police division taken off the army and put under his ministry. The coalition agreement promised him that, he says, and nobody's paid up. He also wants the authority to sign administrative detention orders and movement restrictions moved from the defense minister and the IDF to himself. Those powers have never been turned on "the anarchists" and the anti-Zionist movements, he says, and it's time they were.

The occasion is Qusra, on the central Samarian ridge. Israeli criminals constructed an encampment beside Palestinian homes on the village edge ten days ago and kept coming back after soldiers cleared them out. Central Command holds the ground now with a battalion. It has closed the area to Israelis and barricaded the footpaths people were using to get around the road. The army says it has logged no direct violence against its own troops or against the village's residents. What it has been handling is Israelis blocking roads and obstructing enforcement. The Palestinian-American who owns one of the houses flew in last night and raised an American flag on his roof, with the army escorting him through his own gate.

ASSESSMENT

Nothing seats before 27 October in any case. The plan lands on a chief of staff who has frozen general-officer appointments until the next government takes office.

Blida Is Rubble and Yiftah Is Pouring Foundations for Twenty-Two Families

Kibbutz Yiftah sits on the Lebanese border in the Upper Galilee, about seven hundred people. The noise off its building site carries across the fence into Blida, the Shia village Hezbollah ran as a stronghold until the IDF took most of it apart. Yiftah lost ten families after the north emptied. It's putting up homes for twenty-two new ones, which takes it past the size it was before Hezbollah started firing in October 2023.

Hezbollah's rockets moved roughly 60,000 Israelis out of the north. The government's Tnufa North task force had 87 percent of them back by September 2025, and hundreds of Israelis who never lived up there have moved since. The gaps are specific. Kiryat Shmona, the only city in the region, is still short about a third of its 25,000 people. The Kibbutz Movement puts the area's kibbutzim down around 12 percent.

The tourism hasn't come back. Foreign visitors are gone, the Upper Galilee's summer trade is down, and the rafting outfit at Kfar Blum fields calls every day from Israelis asking whether Hezbollah is about to fire before they put the kids in the car. The IDF is still in south Lebanon.

ASSESSMENT

Twenty-two families are moving onto a border Hezbollah owned two years ago. The security they are pricing in is held by Israeli soldiers across the fence in south Lebanon, where the June framework keeps them until Hezbollah disarms. Kiryat Shmona is the number that matters. A third of a city of 25,000 hasn't come back, and the 87 percent covers that over. The tourism drought is the recoverable half — a lost season is a season, and a family that resettled in the center is gone.

Israel and the World

Saudi Arabia Finishes Taking Jew-Hate Out of Its Schoolbooks

Impact-se examined 136 Saudi textbooks issued for the 2025/26 school year. The last antisemitic material in them is gone. Removed this year: the passage calling Zionism a "racist European movement," and the claim that Zionists set the 1969 fire at the al-Aqsa Mosque. What Saudi students once studied as "The Attempt to Create the Zionist Entity" is now taught as the British Mandate in Palestine. Older editions told them Jews are apostates who had "sold their souls," and that Muslims and Jews are in permanent conflict. The system runs to 35,000 public Islamic schools.

Riyadh still does not recognize Israel. It says that it will not normalize until Israel moves toward a Palestinian state. The working security relationship between the two governments has run for years regardless. Eleven days ago Riyadh signed a mutual-defense clause in Mecca with Turkey and Pakistan.

ASSESSMENT

A curriculum is the slowest instrument a government owns, and Riyadh has spent most of a decade rewriting one for a relationship it still won't sign. The Mecca clause took an afternoon and a photograph; the textbooks took ten years. The Saudi eighteen-year-old in a classroom this year was taught none of what his father was taught about Jews. That is the half of normalization that survives a change of king, and the Palestinian state Riyadh names as its condition is a toll it has been collecting all along.

Reed Settles and Nine More Small Colleges Are Still Fighting

Reed College in Oregon settled a complaint this past week from a Jewish student who said the school did nothing while she was harassed for being a Zionist. After Reed sat on it, the complaint says, the mezuzah on her door-frame was destroyed and somebody threw a rock through her dorm window. Haverford settled in the same week. Pomona and Occidental, both in southern California, had settled theirs in late 2024 and in 2025.

At least nine more small liberal arts colleges are still in dispute — Sarah Lawrence and Union in New York, Swarthmore and Lehigh in Pennsylvania, Middlebury in Vermont, Whitman in Washington, Wellesley and Williams in Massachusetts, and Scripps in California. Most of these began as complaints filed with the Education Department's Office for Civil Rights under Title VI of the Civil Rights Act, brought by the Brandeis Center, the Anti-Defamation League and StandWithUs.

At Lehigh, a Jewish student's mezuzah was stolen and a "Stand With Palestine" sticker went up outside the same door. Campus police ran a short investigation and closed it. When the student identified the person who admitted putting up the sticker, the college declined to discipline him and declined to put any more security in the dormitory. The student asked to be moved to different housing.

Washington has opened investigations into 60 colleges and universities since 2024 and has used federal money as leverage only against the large ones. A federal judge threw out the administration's antisemitism case against Harvard on Thursday.

ASSESSMENT

A college that will not discipline a student who admitted what he did is not going to be moved by a fifth complaint. What gets Jewish students a rule a professor can be held to is a signed agreement with terms in it, and outside lawyers are collecting those one campus at a time because nothing inside these schools was going to produce one. The court route narrowed on Thursday. The judge in the Harvard case read Title VI as a statute for bringing a school into compliance, which leaves the government proving fresh violations after formal notice before it can touch a dollar. The nine still in dispute are sitting behind that bar and in front of the choice Reed just made.

Eight Persian Jewish Families Leave Great Neck for Israel Together

Eight families from the Persian Jewish community in Great Neck, New York, have moved to Israel together. They rented homes in one neighborhood and will send their children to the same schools. Jordan Karmily, 42, was born

in Great Neck and had lived there his whole life. He moved with his wife Joyce, 37, and their six daughters, ages 2 to 14. His parents, his siblings and his cousins all live within walking distance of the house he left.

The community traces to Mashhad in Iran. Karmily's parents' generation reached the United States about fifty years ago, before the 1979 revolution. They built more than 7,000 people into one Long Island town, traditional and affluent and, in his words, "very, very, very tight-knit." "It's a bit of an earthquake in our community, because people don't leave," he said.

Nefesh B'Nefesh, which runs North American aliyah alongside the Aliyah and Integration Ministry, took the families on a pilot trip first. They walked the schools and sat with the municipal officials before anyone committed. Karmily says October 7 is what turned twenty years of talk into a plan. "I never had a dream of retiring in Israel. I wanted to raise a family there."

ASSESSMENT

Karmily put his finger on the thing no aliyah program has been able to buy: "everybody loves Israel, supports Israel, contributes money to Israel," and when it comes to moving, "you support it but you don't want people to actually move there." What stops an American family is leaving the community behind, and these eight took the community with them, down to the shul. No ministry can subsidize that, and it only works where a community is tight enough to move eight families at once. Whether this was eight families or the first eight gets decided in Great Neck.

Briefly Noted

Frontline & Security

- *Jerusalem Post*: UNIFIL says the Israeli flags flying along the Naqoura-Tyre coastal road violate Resolution 1701, and its spokeswoman is asking all actors to avoid "provocative action." Hezbollah spent eighteen years rearming south of the Litani under 1701, and the flags are what made the violations list.
- *Israel Hayom*: Border Police lookouts spotted several men digging beside the barrier at Kalandiya, and the one caught after a foot chase told his interrogators he was sinking a shaft for a tunnel into Israel.
- *Ynet News*: The IDF and the Mossad located the remains of Sgt. First Class Yehuda Katz ז"ל overnight and told his family, forty-four years after he was one of six soldiers left on the ground at Sultan Yacoub on 11 June 1982. Zachary Baumel ז"ל came home in 2019 and Zvi Feldman ז"ל out of Syria last May. Katz was the last.

Diplomacy & Geopolitics

- *Jerusalem Post*: Soldiers of the Syrian Arab Army stood in formation outside the Damascus Citadel on Saturday chanting "I am coming for you Jew... I will make your blood flow in rivers," in footage the Arabic channel Al Araby published a day later. Ahmed al-Sharaa is selling Washington a reformed

Syria, and he needs the Islamists who put him in power more than he needs to discipline them.

Public Diplomacy & Media

- *Jewish News UK*: Diaspora Affairs Minister Amichai Chikli put Tommy Robinson in his Likud primary campaign video and posted the endorsement himself, calling Robinson's following "a movement of millions of British patriots" and "the hope of Europe." The Board of Deputies answered that Robinson is "a thug who represents the very worst of Britain."
- *Ynet*: Twenty-two minutes into his speech marking twenty years since the Second Lebanon War, Naim Qassem read out an article by a "Jewish thinker" at Yediot Aharonot named Moshe Yair, who does not exist, and Hezbollah's own al-Manar cut the passage out of the transcript it published. Pro-Hezbollah accounts have been putting articles under that byline for months, and the text Qassem read had already run on a Lebanese site in June.

Am Yisrael

- *JNS*: The FBI's 2025 numbers, out Friday, put anti-Jewish hate crimes at 1,647, down from 2,095 the year before — and 64 percent of every religion-based hate crime in the country still landed on Jews, who are 2.4 percent of it. The 2026 running count is 829, on police reporting that has thinned from about 90 percent of the country in January to 21 percent in August.
- *Times of Israel*: Magen David Adom medics taught twenty synagogue security volunteers in Westchester County last week how to work tourniquets and triage on a scene police will not enter while it is still hot — the first course under a partnership with the Community Security Service announced Monday. Those twenty carry it back into a network of 7,000 volunteers at more than 500 American synagogues.

Economy, Tech & Infrastructure

- *The JC*: Covenant Industries, an American defense start-up whose founder served in the IDF and whose research runs out of Tel Aviv, fired its Anthem cruise missile for the first time on 6 August near Tan-Tan in southern Morocco, in an exercise US Africa Command ran with the Royal Moroccan Armed Forces. The Americans spent 850 Tomahawks in the first weeks of the Iran war, a quarter of the stockpile, at \$3.6 million apiece — Anthem is pitched at several hundred thousand.
- *Globes*: Meitav has the shekel back as the world's strongest currency — up about 2.5 percent on the dollar over the past month, with the Bank of Israel's representative rate at NIS 2.95 and inflation at 1.5 percent, under the middle of the 1-to-3 percent band. IBI chief economist Rafi Gozlan puts the moderation down mainly to the shekel itself, and has inflation climbing back toward 2.2 percent next year.

Culture, Religion & Society

- *Israel Hayom*: A Jewish People Policy Institute survey of non-religious Israeli teenagers last month has 22 percent praying more since October 7 and 46 percent saying their friends keep more customs than they used to, with no sign that any more of them believe in God than before.
- *The JC*: Digging ahead of a new bus terminal in Ramat Gan, the Israel Antiquities Authority came up with a whole planned commercial quarter from the 7th or 8th century — intersecting streets, rows of shops and warehouses, pottery kilns — on the road that ran from Jaffa through Ramla to Jerusalem, abandoned after about 150 years and never resettled.

Developments to Watch

Northern Front (Lebanon / Syria)

- **Nobody claims the Abu al-Duhur strikes** — Four strikes went into the runway and storage sheds of the Abu al-Duhur military airfield in eastern Idlib overnight, the first on that field since Assad fell, and no air force has claimed them. Al-Sharaa's government has not named an attacker or acknowledged the damage on a base three hundred kilometers from Israel, and the IDF has not addressed it.
- **Metula's orchards are still armed** — An old munition nobody had ever located went off in the nectarine orchards outside Metula this morning and wounded six Thai farm workers, two of them seriously. Those orchards are being worked right now, and the police are telling the north to leave shrapnel and interceptor fragments where they lie.

Gaza & Southern Theater

- **Eshkol has not been told anything** — Michal Uziyahu, who runs the Eshkol Regional Council, says her communities talk to the army every day and have had no conversation with the government about what changes on their side of the fence when foreign troops go into Gaza. She is already watching Board of Peace vehicles cross, and Route 232, the one road her villages have, is what reconstruction convoys and an international force would run on.
- **A clan buries two in Sheikh Radwan** — Hamas says it is holding the gunmen who shot several men of the Abu Warda clan outside a gym in Sheikh Radwan on Saturday, two of whom have since died of their wounds. The clan is demanding blood, armed men in civilian clothes filled both funerals, and the organization being told to surrender every weapon in the Strip cannot get the ones in its own capital holstered.

Regional Axis (Iran, Houthis, Militias)

- **Ansar Allah puts drones on Jizan** — The Houthis say they put drones into Aramco's refinery at Jizan this morning and missiles into a Saudi warship and its four escorts on Monday, and Riyadh has confirmed neither. A

Houthi politburo member named Saudi oil installations as Ansar Allah's answer if Riyadh backed a ground campaign in Yemen, and the claims are now arriving in that order while Riyadh has not launched one. **LIKELY TO ESCALATE**

- **The Guards take an Emirati tanker** — Iranian state television says the Revolutionary Guards have detained a tanker in the strait for breaking Iranian rules, and ship-tracking has an Emirati-owned tanker stopped off Qeshm. Abu Dhabi has kept its own line into Tehran open through the whole closure, and the Guards just took one of its ships.
- **Ghalibaf lands in Baghdad tomorrow** — Mohammad Bagher Ghalibaf leaves for Iraq tomorrow morning at the head of a parliamentary delegation, with border security and the implementation of joint agreements on the agenda. Iran's lead negotiator arrives the day after Baghdad opened an inquiry into drones its own Kurdish counter-terrorism service traced to Iranian soil, and the militias Iraq is supposed to disarm by 30 September take their orders from Tehran.
- **Tehran reads out the carriers' names** — An Iranian military official has named Maersk, Crowley and four other operators as companies Tehran is examining for hauling fuel and ammunition to American forces, and warned them of legal and economic consequences. The American blockade at Hormuz moves on commercial hulls with civilian crews, and Tehran has just told those crews' owners it does not count them as civilian.

Diplomatic & Legal

- **Hamas builds a ballot line through Dahlan** — Mohammed Dahlan sat in on Kushner's meeting with Khalil al-Hayya in Cairo on Sunday, and Hamas has confirmed a run of meetings with his Democratic Reform Current about a joint list for the late-November Palestinian elections. A ballot line is how a group under orders to surrender its weapons walks back into Palestinian politics without surrendering any, and a senior Palestinian Authority official already calls it "a Hamastan in the form of Dahlan."
- **The Security Council polls again Friday** — The Council takes its second straw poll on Guterres's successor on Friday, the round that shows how many veto-holders have marked each candidate "discourage." Rebeca Grynspan won the July vote and Israel has backed nobody, so the institution that runs the inquiries and the rapporteurs picks its next chief while the state they are aimed at sits the vote out.

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