

DAILY BRIEFING

The Dispatch

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MAIN STORY: LEBANON SETS MONDAY'S DAWN AS THE REAL TEST OF A CEASEFIRE ISRAEL BOMBED THROUGH

- The 45-day extension of the 16 April cessation of hostilities, agreed at the close of the third Washington round on Friday, did not survive its first day. Israel ran a wave of strikes across the Sidon, Nabatieh and Tyre districts on Saturday, the first it openly framed as post-extension action against Hezbollah, hitting a building in Tyre city after a 300-meter evacuation warning and driving a mass exodus toward Sidon and Beirut. The Lebanese health ministry put the cumulative toll since the 2 March resumption of Israeli operations at 2,969 killed and 9,112 wounded.
- Lebanon is running intensive contacts with Washington to convert the paper extension into an actual halt, with a ceasefire taking effect at midnight Sunday into Monday still on the table and no Israeli sign-off secured. The Lebanese formula demands an end to the targeting of infrastructure and civilians, Washington signaled understanding and support, and Israel set its agreement on mutual commitment from both sides. Beirut conveyed the arrangement to Hezbollah through Speaker Nabih Berri.
- A Lebanese official set the marker explicitly, calling the night of 17 May the test of whether the extension means anything on the ground and Monday's dawn the line between a truce that exists only in the Washington communiqué and one civilians can return on.
- Berri called himself "opti-pessimistic," said flatly "there is no ceasefire," restated his preference for indirect negotiations, and held that any durable agreement requires a "Saudi-Iranian-American umbrella." He told President Joseph Aoun he can deliver Hezbollah's full commitment to a halt if the delegation extracts a firm Israeli commitment and a stop to home demolitions in the south.
- Hezbollah kept its counter-fire running through the window, launching drones at an Israeli barracks near Nahariya and striking the Rosh HaNikra crossing. The Israeli military announced Captain Maoz Recanati, 24, a Golani platoon commander a month from his wedding, and Staff Sergeant Negev Dagan, 20, killed in south Lebanon.
- The next fixed points are a Pentagon-hosted security track on 29 May, now treated as the central axis of the negotiation, and a political track at the State Department on 2 and 3 June.

STRATEGIC ASSESSMENT

The 45-day extension was never a ceasefire, it was a calendar, and Saturday's strike wave through

the Sidon-Nabatieh-Tyre line confirmed Israel reads the document as licence to keep operating while the political track runs. Beirut's move is to force a binary the communiqué left vague, an actual cessation of fire on civilians and infrastructure dated to Monday's dawn, with Hezbollah pre-committed through Berri so the Lebanese state, not the party, owns the test. Israel's "mutual commitment" condition is the escape hatch, since it lets any Hezbollah round anywhere restart the count and keeps the kinetic option attached to a diplomatic process it has not slowed. The 29 May Pentagon security track is where the disarmament sequence and the up-to-two-year withdrawal get priced, and a Monday that opens with strikes rather than silence tells the Lebanese delegation what leverage it actually carries into that room. A quiet dawn turns the extension into something Beirut can hold the delegation to on 29 May, and a loud one leaves the Washington track running on paper above a south that never left the war.

IRAN

- Foreign Minister Abbas Araghchi said a lack of trust is the central obstacle to ending the war, that contradictory US messaging has left Tehran "in doubt about their seriousness," and that talks advance only on a "fair and balanced deal," while opening the door to Chinese help in narrowing the gap.
- Tehran held its position that the dispute is now a deadlock over enriched material, against Washington's demand to remove highly enriched uranium and Trump's dismissal of Iran's latest written proposal as "garbage" alongside his offer of a 20-year suspension if Tehran shows genuine commitment.
- Military spokesman Mohammad Akraminia recast the Strait of Hormuz blockade as a revenue instrument, claiming Iranian oversight could roughly double oil income and strengthen Tehran's international standing, moving Hormuz from a desperation lever to a stated economic-leverage policy.
- President Masoud Pezeshkian wrote to Pope Leo XIV pressing the argument that the international community must hold Washington accountable for what Tehran casts as illegal actions, extending Iran's Vatican-track outreach.

ISRAEL

- The ruling coalition submitted a call for an early election after ultra-Orthodox parties withdrew support over the Haredi conscription exemption. A Knesset vote expected next week would trigger a general election within 90 days, projected for the third week of August, two months before the government's term ends on 27 October.
- Former prime ministers Naftali Bennett and Yair Lapid united to challenge Netanyahu, betting they can rehabilitate Israel's collapsed international standing while keeping the Gaza and regional war policies that produced the isolation.
- The head of a rural-security organization warned of a loss of state control across the Negev and Galilee, with criminal networks running large-scale water, electricity and jet-fuel theft and thousands of drug greenhouses operating inside IDF firing zones, costs borne directly by Israeli

citizens.

LEBANON

- BBC Verify geolocated 35 Hezbollah videos since 26 March showing first-person-view and fibre-optic-guided drone strikes on Israeli soldiers, armor and air-defense systems, with the Israeli military still without an effective countermeasure and at least four soldiers and one civilian killed by the cheap systems.
- Druze leader Walid Jumblat said he does not fear a new civil war because only Hezbollah is armed, but warned that some Lebanese figures are reviving an old Israeli-linked theory that treats Mount Lebanon as Christian land and calls for expelling the Shiite community, which he called suicidal.
- Lebanon is carrying into the talks the position that Hezbollah's arms are addressed internally only after a ceasefire and an Israeli withdrawal, against an Israeli demand to front-load disarmament.

SYRIA, NO SIGNIFICANT DEVELOPMENTS

PALESTINE

- UPDATE: The Israeli military formally confirmed it killed Hamas Gaza chief Ezzedine al-Haddad, signaled it would use the death to press its plan to disarm Hamas and demilitarize the Strip, and named "a significant operational achievement," while Hamas's internal leadership succession went to a second round without resolution.
- UPDATE: Initial Fatah congress results placed jailed leader Marwan Barghouti at the top of the Central Committee vote and elected Yasser Abbas, the president's son, to the body, with Jibril Rajoub re-elected secretary-general and former Al-Aqsa Brigades commander Zakaria Zubeidi entering as a newcomer.
- Settlers attacked the village of Mrah Rabah south of Bethlehem, beating residents and using pepper spray and wounding five, performed Talmudic rituals at the entrance to Sinjil northeast of Ramallah, and raided Osarin south of Nablus.
- An active-duty IDF reservist was dismissed and his weapon confiscated, and five Israelis were arrested, for vandalizing Palestinian vehicles near Shukba in the occupied West Bank.
- Palestinians in the al-Bustan quarter of Silwan began demolishing their own homes ahead of a Jerusalem municipality plan to clear the area for a biblical-themed park beneath the Old City walls.
- Palestinians marked the 78th anniversary of the Nakba with commemorations and a London march, with community figures describing today's displacement as worse than 1948.

KEY REGIONAL EVENTS

- **Iraq:** Prime Minister Ali al-Zaidi, the country's youngest at 41, is under combined US and Iranian pressure as he tries to complete a cabinet with nine sovereign portfolios still unfilled, having pledged a state weapons monopoly under US pressure to dismantle Iran-backed militias, while Nouri al-Maliki circulated video framing the confidence session that installed al-Zaidi as a betrayal.
- **UAE:** Energy Minister Suhail al-Mazrouei announced the UAE's withdrawal from OPEC and OPEC+, calling it a sovereign and strategic decision rather than a political one, a structural break in Gulf production coordination as Abu Dhabi accelerates its Hormuz-bypass export capacity.
- **UAE:** President Mohammed bin Zayed and Vladimir Putin discussed strengthening the strategic partnership and regional developments by phone, with Putin praising the UAE's role in prisoner exchanges.
- **Sudan:** The Sudanese Armed Forces retook the Khor Hussein area near the strategic Ethiopian-border town of Kurmuk in Blue Nile State, and former Rapid Support Forces field commander Ali Rizqallah, known as "Savanna," arrived in Khartoum after publicly defecting.
- **Pakistan:** Interior Minister Mohsin Naqvi arrived in Tehran for talks aimed at restarting the stalled Washington-Tehran track.

KEY INTERNATIONAL EVENTS

- The US Senate rejected a resolution curbing Trump's power to wage war on Iran by 50 to 49, the seventh failed Democratic attempt and the first vote since the 60-day War Powers deadline lapsed on 1 May, with the administration arguing the clock was paused by the April ceasefire.
- Xi Jinping warned Trump that mishandling Taiwan could push the two powers into conflict and vowed China would not arm Iran, Trump warned Taiwan against declaring formal independence and called it a "negotiating chip," and Taiwan responded that it is a sovereign and independent nation not subordinate to Beijing.
- A vessel anchored 38 nautical miles northeast of Fujairah was seized by unauthorized personnel and steered toward Iranian waters, the latest maritime incident at the mouth of the Strait of Hormuz.
- Russia killed at least six in a rare daytime 800-drone barrage on western Ukraine, raised the confirmed Kyiv apartment-block toll to 24 including three children, and ruled out any ceasefire unless Ukraine withdraws from Donbas.
- Ukraine sent 556 drones into the Moscow region, killing three, in the heaviest retaliation since the Kyiv strike.
- British Prime Minister Keir Starmer faces open Labour rebellion after Health Secretary Wes Streeting resigned to challenge him and Greater Manchester mayor Andy Burnham moved toward a leadership bid, leaving the government in weeks of uncertainty around the King's Speech.
- The World Health Organization declared the Ebola outbreak in Congo's Ituri province and Uganda

a public health emergency of international concern, with 336 suspected cases and 88 deaths from the rare Bundibugyo strain, which has no approved vaccine.

- Spain, the Netherlands, Ireland, Iceland and Slovenia boycotted the Eurovision final over Israel's participation amid the Gaza war, the largest boycott in the contest's 70-year history.

MARKETS

- US consumer inflation rose to 3.8 percent annually in April, the strongest since May 2023, with energy accounting for more than 40 percent of the increase, the Cleveland Fed projecting 4.2 percent for May, and inflation now outpacing wage gains as Trump returned from Beijing to domestic price pressure.
- The British pound fell 1.4 percent against the dollar over the week and government borrowing costs rose on investor concern over the Labour leadership crisis.
- Lebanese real-estate sales fell 29.3 percent year-on-year in the first quarter to 11,949 transactions, with total transaction value down 18.2 percent to below 1.53 billion dollars, as geopolitical risk and eroded investor confidence compounded the existing crisis.
- US naval blockade enforcement on Iran had rerouted 78 commercial ships and disabled four as of 16 May, holding the Hormuz disruption premium on global energy and supply chains.
- India opened talks with Saudi Arabia to secure additional fertilizer and urea supply after the Hormuz closure cut the Gulf import routes that cover up to 30 percent of its needs.

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