

DAILY BRIEFING

The Dispatch

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MAIN STORY: THE STRIKE ON THE UAE'S BARAKAH NUCLEAR PLANT REOPENS THE IRAN WAR DECISION

- A drone penetrated UAE airspace from the western border on Sunday and struck an electrical generator outside the inner perimeter of the Barakah nuclear power plant in the Al Dhafra region, the only nuclear station in the Gulf and the first ever attacked. Emirati air defences engaged three drones and downed two, the third hit the generator and started a fire that was contained, the Federal Authority for Nuclear Regulation recorded no injuries and no radiological impact, and Unit 3 ran on emergency diesel generators. Barakah began operations in 2020 roughly 200 kilometres west of Abu Dhabi near the Saudi and Qatari borders.
- Saudi air defences intercepted and destroyed three drones that entered the Kingdom from Iraqi airspace the same morning, and the Defence Ministry said it reserves the right to respond at the appropriate time and place. No party claimed either attack, the UAE opened an investigation into the source and pointed to Iran or an Iranian proxy, and the westward Barakah flight path tracks back through Saudi territory toward Houthi-held northern Yemen.
- Foreign Minister Sheikh Abdullah bin Zayed called IAEA Director General Rafael Grossi to condemn a treacherous terrorist attack and assert the UAE's full right to respond, Grossi called any military activity threatening nuclear safety unacceptable, and Qatar, Kuwait, Bahrain, Jordan, Egypt, the GCC secretariat and Canada condemned the strike as a dangerous escalation.
- Trump posted that the clock is ticking for Iran and there will be nothing left of them, circulated an image captioned "the calm before the storm," and is set to meet his national security team on Tuesday on military options after a Saturday session at his Virginia club with Vance, Rubio, Ratcliffe and Witkoff. The military option is back on the table after Tehran refused to concede on enrichment.
- Netanyahu held a phone call of more than thirty minutes with Trump on Sunday covering the China visit and a resumption against Iran, then convened the security cabinet and said Israel is ready for all scenarios. The next Israeli strikes would be a joint US-Israeli operation pending Trump's approval, candidate targets include Iran's national energy infrastructure, and an Israeli estimate puts the probability Trump orders a restart near fifty percent.
- Washington's written response to Tehran set five terms, that Iran keep a single nuclear site, transfer its highly enriched uranium stockpile cited at 400 kilograms to the United States, accept no release of frozen assets and no war reparations, and a halt on all fronts tied to negotiating progress. Iran's counter-terms demand an end to the war on every front including Lebanon, sanctions relief,

release of frozen funds and recognition of its role over the Strait of Hormuz, and Pakistan carried a modified Iranian proposal to Washington overnight.

STRATEGIC ASSESSMENT

The Barakah strike crosses a line the 28 February 2026 US-Israeli war on Iran had not, a hit on Gulf civilian nuclear infrastructure rather than on Iranian or proxy military targets, and it removes the argument that the Gulf can stay outside the kinetic file while diplomacy runs. Whoever launched it, the effect is to validate the Israeli and US case for resumption and to strip Tehran's negotiating leverage at the moment Pakistan was carrying its modified text into Washington. Trump's Tuesday national security meeting now convenes against a concrete Gulf escalation rather than an abstract patience clock, which raises the cost to him of choosing the diplomatic path and lowers it for the strike option his planners have already staffed. The Emirati and Saudi reservations of a right to respond add a second decision-maker to the resumption question, because a Gulf retaliation against Iranian or Iraqi-territory launch sites would reopen the war without Washington pulling the trigger. The threshold that held through the ceasefire was the separation of the Gulf states from the target set, and Barakah is the first evidence that separation no longer holds.

IRAN

- Speaker Mohammad Bagher Qalibaf, the lead negotiator with Washington, was named special representative for China affairs with the approval of Supreme Leader Mojtaba Khamenei, who succeeded his father Ali after the strike that killed him, taking a coordination role left vacant by Ali Larijani's death in the 17 March strike. A classified US intelligence assessment prepared for Joint Chiefs Chairman Dan Caine concluded China is using the war to bank military, economic and diplomatic gains against Washington.
- President Masoud Pezeshkian told the visiting Pakistani interior minister that Islamic unity narrows the room for external intervention, thanked Pakistan, Afghanistan and Iraq for refusing to let their soil be used against Iran, and disclosed an attempt by armed elements to infiltrate the border during the war.
- Mohsen Rezaei warned that a continued US blockade would turn the Sea of Oman into a graveyard for American ships and claimed Iran struck a US frigate that entered the Strait from the Omani side, while a parliamentary security committee spokesman said standing orders are that no American soldier survives a ground attack on Iran.
- The judiciary's execution rate climbed sharply since the war began, with 39 executions recorded since the start of the conflict including 10 on espionage charges and the assets of 129 people seized in West Azerbaijan for alleged collaboration, against an Amnesty International count of more than 2,159 Iranian executions in 2025 within a global total of 2,707, the highest since 1981.
- The Tehran Stock Exchange reopens Tuesday after a closure of more than 70 days, the longest in its history.

ISRAEL

- The military presented the political level with a shortfall of roughly 12,000 conscripts including about 7,000 combat troops, widening by a further 7,000 in January when extended service reverts from 36 to 30 months, and called this the last window to legislate more manpower while fighting on multiple fronts. Avigdor Liberman accused Netanyahu of trading national security for a personal political arrangement with Trump aimed at ending his trial.
- The coalition crisis over the ultra-Orthodox conscription exemption returns to committee Wednesday alongside a first vote to dissolve the Knesset backed by both coalition and opposition, a sequence Netanyahu is working to delay to postpone an early election.
- The International Criminal Court decided in principle to seek arrest warrants against five more senior Israelis, three politicians and two officers, eighteen months after the Netanyahu and Galant warrants, while the court publicly called reports that the new warrants were already issued inaccurate.
- Netanyahu approved a Defence Ministry compound on the demolished UNRWA headquarters site in Sheikh Jarrah in occupied East Jerusalem, a roughly 36-dunam plot allocated without tender for a military museum, a recruitment office and a minister's office, which Defence Minister Israel Katz called a decision of sovereignty, Zionism and security.
- A New York Times investigation described two secret Israeli bases in Iraq's western desert used during the war on Iran, one near al-Nukhayb discovered by chance by shepherd Awad al-Shammari, 29, who was killed on 3 March after a helicopter chased and fired on his pickup, with Iraqi officials confirming a second undisclosed site and questioning US foreknowledge.
- Croatian President Zoran Milanovic refused for seven months to approve ambassador-designate Nisan Amdor over the conduct of Netanyahu's government, the first such refusal in Croatia's history, leaving the embassy under a charge d'affaires from month-end.
- Israel claimed Netanyahu made a secret breakthrough visit to the UAE during the war, the Emirati state agency denied any such visit occurred, and the dispute itself drew internal Israeli criticism that publicising it compromised the relationship.

LEBANON

- UPDATE: The 45-day extension of the 16 April cessation of hostilities, agreed Friday at the close of the third Washington round, took technical effect at dawn Monday contingent on mutual commitment that neither side has confirmed, with the political track set for 2 and 3 June and a Pentagon-hosted security track on 29 May. President Joseph Aoun is in direct contact with the US mediator to bind Israel, Speaker Nabih Berri carries the file to Hezbollah on the formula "bring a complete ceasefire and the rest is on me," and Prime Minister Nawaf Salam said the country has had enough of reckless adventures serving foreign projects.
- UPDATE: An Israeli guided missile struck an apartment at the southern entrance of Baalbek around midnight and killed Palestinian Islamic Jihad commander Wael Abdel Halim and his 17-year-old daughter Rama, with three wounded. Strikes across the Nabatieh, Tyre and Bekaa districts killed

seven on Sunday, a strike on Tayr Felsay killed six including a woman and a child, and the health ministry put the cumulative toll since the 2 March resumption of Israeli operations on Lebanon at 2,988 killed and 9,210 wounded.

- The Israeli military said it struck more than 30 Hezbollah infrastructure targets in 24 hours, reported 105 soldiers wounded in south Lebanon over the past week, and confirmed two officers and two soldiers wounded, one severely, by an overnight roadside bomb.
- The military ordered evacuations in Sahmar in West Bekaa, Roumin, Qsaybeh, Kfarhouna and Bennafoul, then a second wave over Arzi, Marwanieh, Babliyah and Bisariyah in the Sidon district.
- Hezbollah ran counter-fire through the window, hitting Israeli vehicles and troop concentrations in al-Bayyada and Rashaf with drones and rockets, an artillery position in Adaisseh, and a gathering at the Naqoura port, while an Israeli count put weekend fire at roughly 200 projectiles.
- The Israeli delegation in Washington tabled five conditions including a flat rejection of Lebanese Army and UNIFIL guarantees and insistence on intervention against any emerging threat, and Israeli reporting described a push for a joint Israeli-Lebanese operations room under US supervision and study of a ground push beyond the unilateral post-ceasefire Yellow Line that Israel declared.
- The general amnesty bill stalled, with Berri calling the Joint Parliamentary Committees for Tuesday at 11:00 and the Bureau of Parliament to Ain al-Tineh at 17:30, major blocs and principal Sunni figures boycotting Deputy Speaker Elias Bou Saab's consultation, and MP Jamil al-Sayyed proposing a special amnesty through cabinet instead of parliament over a dispute on the sentencing ceiling.
- Walid Jumblatt called the ceasefire an illusion and a mirage and pressed the state to prepare new shelters and the coming school year, while reporting documented rising criticism of Hezbollah and of Iran inside the Shiite community over villages destroyed and families displaced.
- Saudi Arabia advised Beirut to anchor on the 1949 Armistice and not to rush, worked through Washington to halt Trump's pressure for an Aoun White House visit and a Netanyahu meeting that Aoun refused, and is sending envoy Yazid bin Farhan to follow the file.

SYRIA

- US envoy Tom Barrack called Syria a laboratory for a new regional alignment built on diplomacy and integration after meeting Saudi Foreign Minister Faisal bin Farhan in Riyadh, as a UN Security Council session described real but fragile progress under President Ahmad al-Sharaa and warned of declining humanitarian funding.
- Israeli forces ran repeated incursions into the Daraa and Quneitra countryside, advancing into Wadi al-Raqqad near Jamla, deploying more than 30 soldiers into Kudna before withdrawing, and raiding homes in Aisha, with no Syrian government response.
- The Israeli army detained ten settlers of the "Ruwwad al-Bashan" movement who crossed the border below Mount Hermon between Majdal Shams and Hadar to demand settlement inside Syria, returned them and handed them to Israeli police, calling it a criminal offence.
- Farmers in Deir Ezzor, Raqqa and Daraa protested the official wheat purchase price set at 46,000 Syrian pounds a ton, blocking the Naim roundabout in Raqqa and warning of reduced deliveries to the state, as the pound passed 14,000 to the dollar in Hasakah markets.

- President al-Sharaa replaced central bank governor Abdulkader Husrieh with Mohammed Safwat Raslan, and roughly 120,000 Syrian refugees returned from Lebanon in the first four months of 2026.

PALESTINE

- Israeli naval commandos of Shayetet 13 intercepted the Global Sumud Flotilla on Monday morning, a convoy of more than 50 vessels carrying around 400 to 426 activists from 39 countries that left Turkey to break the Gaza blockade, detained roughly 100 participants and moved them toward a navy ship and Ashdod port, and the flotilla said it came under a direct raid and lost contact with one vessel.
- UPDATE: The military confirmed it killed Ezzedine al-Haddad, who became Qassam Brigades chief of staff after Mohammed Sinwar, in a Friday dual strike on a Remal apartment and a fleeing vehicle that also killed members of his family, attributing the success to his relaxed personal security, and Netanyahu said Israel is close to eliminating every architect of the 7 October attack.
- Netanyahu said Israel now controls 60 percent of Gaza rather than 50 and that Hamas is in its grip, as strikes killed six to eight across the Strip, a strike on a charity kitchen near al-Aqsa Martyrs Hospital in Deir al-Balah killed three, and the toll since the 11 October ceasefire reached 871 killed and 2,562 wounded.
- The West Bank death penalty law took effect after the regional commander signed the implementing order, applying solely to Palestinians under military jurisdiction.
- UPDATE: Fatah's Eighth Congress elected its Central Committee with jailed leader Marwan Barghouti topping the vote, the president's son Yasser Abbas winning a seat, intelligence chief Majed Faraj and former Al-Aqsa Brigades commander Zakaria Zubeidi entering, and Jibril Rajoub re-elected secretary-general.
- Israel approved seizing 15 to 20 Palestinian properties along Bab al-Silsila adjoining al-Aqsa in the Old City, the first such confiscation since 1967, approved converting the demolished UN-RWA Jerusalem headquarters into military facilities, and 443 settlers entered al-Aqsa through the Mughrabi Gate.
- The United Nations demanded independent investigations into more than 90 Palestinian prisoner deaths in custody and documented systematic torture, while settlers cut around 150 trees in Yasuf east of Salfit.

KEY REGIONAL EVENTS

- **Iraq:** US authorities arrested Kataeb Hezbollah commander Mohammed Baqer al-Saadi in Turkey and charged him with planning mass-casualty attacks on US, Israeli and Jewish targets across the US, Canada and Europe, with the FBI calling him a high-value target, and the new government of Prime Minister Ali al-Zaidi has not commented as parliament splits over the handover.
- **Iraq:** Muqtada al-Sadr broke his political retirement to phone al-Zaidi and back his government on sovereignty and anti-corruption, while exhumation began at seven mass graves in Saqlawiya

in Anbar with 16 sets of remains recovered, some of victims executed blindfolded.

- **Iraq:** Basra's electricity supply destabilised as local gas production fell from 900 to 350 million cubic feet with Iranian gas halved by the war, and central bank net foreign assets dropped to about 93.3 billion dollars on falling oil revenue.
- **Yemen / Houthis:** The government and the Houthis signed an Amman deal to exchange 1,750 detainees with implementation deferred to July, and two days later a Houthi-run Sanaa court sentenced 19 of 23 defendants to death for aiding the aggression.
- **Jordan:** King Abdullah told visiting Australian Deputy Prime Minister Richard Marles that any deal ending the US-Iran war must guarantee Arab states' security and pressed for stronger international effort to sustain the April ceasefire, and Jordan signed a 78.2 million dollar water-infrastructure agreement with Washington.
- **Egypt:** President Sisi opened the New Delta land-reclamation project west of the Nile, costed near 800 billion Egyptian pounds and targeting more than 2.2 million feddans, framed against post-war food and energy supply disruption.
- **Pakistan:** The military's media wing warned India that any attempt to target Pakistan would bring consequences not confined to a limited geography, responding to the Indian army chief's remark questioning Pakistan's place in geography and history.

KEY INTERNATIONAL EVENTS

- Nearly 600 Ukrainian drones struck Russia overnight in the largest attack on the capital region of the war, killing three in Moscow region and one in Belgorod including an Indian worker, after Russia hit the Black Sea export port of Odesa and Dnipro with drones and missiles.
- A US intelligence assessment found Cuba acquired more than 300 attack drones and has discussed using them against the Guantanamo Bay base, US warships and Key West, citing Iranian military advisers in Havana, an assessment that could become a pretext for US action.
- China committed to about 17 billion dollars a year in US agricultural imports for 2026 through 2028 days after the Beijing summit, and the US trade representative said Trump extracted a commitment that Beijing provide no material support to Iran.
- The carrier USS Gerald R. Ford returned to Norfolk after a 326-day deployment, one of the longest since Vietnam, having moved from the Caribbean to the Gulf for operations tied to the war on Iran.
- The State Department dismissed roughly 250 diplomats last week by brief email amid the Iran war and the Ukraine crisis, part of a wider departure of senior officials.
- Venezuela handed Maduro fixer Alex Saab to the United States, a man with prior ties to Iran and Lebanon, in a move that could strengthen the US criminal case against Maduro after his capture.

MARKETS

- Oil rose for a third straight session to a two-week high, with Brent near 110 to 111 dollars a barrel and WTI near 106 to 108, up more than 8 percent on the week and roughly 50 percent since the first US strike at the end of February, on the stalled talks and the Barakah and Saudi drone attacks.
- Gold fell 1.3 percent to about 4,480 dollars an ounce and silver 2.5 percent on a bond sell-off and inflation fears, the Japanese ten-year yield rose to 2.8 percent, and Gulf equities closed lower after the Gulf drone strikes.
- A Reuters analysis put the war's cost to listed global companies at no less than 25 billion dollars with about 279 firms citing it for defensive measures, while Kpler estimated cumulative Middle East crude and condensate supply losses near 782 million barrels through 8 May and above one billion by month-end.
- US naval enforcement on Iran has rerouted 81 commercial ships and disabled four, with the USS Tripoli now on station, and Shanghai-to-Gulf container freight hit a record after rising from 980 to 4,131 dollars since 15 May.
- The US let a sanctions waiver lapse that had allowed countries including India to import seaborne Russian oil, removing a measure imposed to limit energy-market disruption from the war.
- Israel's economy contracted 3.3 percent annualised in the first quarter with private consumption down 4.7 percent and military spending up 9 percent, ending two quarters of growth.
- Lebanon's direct and indirect war losses exceed 25 billion dollars with 12 billion needed for reconstruction and about 30 million dollars a day in indirect losses, and roughly 22.5 percent of farmland is war-affected with the share needing food aid at 24 percent.

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