

## DAILY BRIEFING

# The Dispatch

DATE: 19 May 2026 ISSUED BY: Core Group — OSINT Unit  
ANALYSIS LEVEL: Operational, Level 2 CLASSIFICATION: **Limited Distribution**

## MAIN STORY: TRUMP CALLS OFF THE TUESDAY IRAN STRIKE AT THE GULF'S REQUEST

- Trump posted on Truth Social that he had postponed a military attack on Iran planned for Tuesday at the request of Qatar's Emir Tamim bin Hamad Al Thani, Saudi Crown Prince Mohammed bin Salman and UAE President Mohamed bin Zayed, saying "serious negotiations" were now under way toward a deal "very acceptable" to the United States with "no nuclear weapons for Iran." He framed the hold as short and said he had instructed the military to be ready for "a full, large scale assault of Iran, on a moment's notice" if no acceptable deal is reached.
- Trump told the New York Post he is "not open to anything right now," walking back his Friday willingness to accept a twenty-year moratorium on Iranian enrichment, and said Iran knows "what's going to be happening soon." This was the second documented last-minute reversal in roughly a month, after a prior pullback he attributed to the Pakistani mediator.
- The White House assessed that Iran's updated proposal, delivered Sunday night through the Pakistani channel, carried only token improvements and was insufficient, and Trump remained set to convene his national security team in the Situation Room on Tuesday on military options. A senior US official said that absent an Iranian shift, Washington would continue the negotiation "through bombs."
- Deputy Foreign Minister Kazem Gharibabadi laid out Iran's counter-terms to the parliamentary national security committee: the right to continue uranium enrichment and peaceful nuclear technology, an end to hostilities on all fronts including Lebanon, lifting of the US naval blockade, release of frozen Iranian funds, removal of US and UN sanctions, war reparations, an international reconstruction contribution and withdrawal of US forces from areas around Iran.
- Pakistani Interior Minister Mohsin Naqvi arrived in Tehran on Saturday for a two-day mediation visit days after army chief Asim Munir's trip, meeting Foreign Minister Abbas Araghchi and Interior Minister Eskandar Momeni. Araghchi called Washington's "contradictory and arrogant" conduct a serious obstacle and said Iran would not ease its defensive readiness, while President Masoud Pezeshkian said "dialogue does not mean surrender" and that Iran negotiates "with dignity."
- US officials cautioned that the announced delay may be a deception cover, citing evidence that Iran used the 8 April ceasefire to reconstitute and reposition its forces, with a US military officer's assessment that the war had left "a tougher, more resilient adversary" and Pentagon munition stocks under strain that is affecting supplies to Ukraine and other allies.

## STRATEGIC ASSESSMENT

The hold turns Tuesday's Situation Room session from a launch decision into a review of options and concedes that the resumption clock is now read in three Gulf capitals as much as in Washington. Naming Tamim, bin Salman and bin Zayed in the post fixes the political price of any restart on Doha, Riyadh and Abu Dhabi, the same capitals carrying Iran's text and absorbing the drone risk if the war returns. Tehran read the pause as vindication of its fixed terms rather than as leverage to move, which is why Gharibabadi's list hardened instead of narrowing and the White House calls the counter token. The structural problem is unchanged, because each side's opening positions remain the ceiling of its demands rather than a negotiating floor, and the Pakistani channel moves paper without closing the enrichment gap. What the postponement actually buys is days, and whether they extend turns on whether the Gulf three can deliver an Iranian concession their own intercession has now made them accountable for.

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## IRAN

- Iran has reconstituted much of the missile force the February campaign targeted, with operational capability restored at 30 of 33 launch sites along the Strait of Hormuz, roughly 70 percent of mobile launchers and about 70 percent of the pre-war ballistic and cruise inventory still held, and close to 90 percent of the underground storage and launch complexes intact.
- A parliamentary anti-corruption deputy demanded the central bank explain returning 15 million dollars in Tether to sanctioned oil trader Babak Zanjani during the war while his unresolved two-billion-euro debt case remains open, calling the move a transparency failure that requires a public answer.
- Tehran police announced the arrest of two people accused of infiltrating the capital under journalistic cover, the latest in a wartime internal security sweep that has run alongside a sharp rise in executions and asset seizures.
- A conservative lawmaker disclosed that a closed parliamentary session was told decisions reached the Supreme Leader within minutes throughout the twelve-day high-intensity phase, a rebuttal of claims that wartime command access had broken down.

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## ISRAEL

- The Health Ministry put cumulative wounded since the 28 February start of the war on Iran at 8,771, with about 870 hospitalized from the northern front since the 8 April Iran ceasefire and 452 since the 17 April Lebanon ceasefire.
- Netanyahu told the cabinet that neutralizing Hezbollah's fiber-optic first-person-view drones, which evade jamming, was a priority and ordered a solution, while a security source told public broadcaster Kan there is no military answer even if all of south Lebanon is occupied and that some Israeli offensive operations were cancelled or postponed because of the drone threat.
- UPDATE: The security establishment assessed that the prime minister's office did "huge, inde-

scribable damage" by publishing on 13 May Netanyahu's 26 March visit to Mohamed bin Zayed in Al Ain, conducted in extreme secrecy during the war, with Abu Dhabi's denial the first time the UAE had publicly contradicted an Israeli prime minister's statement.

- Israel's UN ambassador said neither UNIFIL nor European, international nor Lebanese state forces can stop Hezbollah, that only the Israeli army can, and that there will be no calm in Lebanon while Hezbollah remains on the ground.

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## LEBANON

- UPDATE: At least four people were killed in Kfarsir and others wounded in strikes on Harouf and a vehicle on Tuesday, with overnight strikes on Shehabiyeh, al-Rihan, Kafra, Kfardounin, Qalaway, al-Maashouq and al-Mansouri, as the cumulative toll since the 2 March resumption of Israeli operations passed 3,000 killed on Monday, including 292 women and 211 children, with more than a million displaced and families sheltering in tents in Beirut.
- Hezbollah fired around 200 projectiles over the weekend by an Israeli count and on Monday claimed strikes on an Iron Dome platform, an Israeli troop concentration and soldiers inside a tent in Dabel using a precision attack drone.
- UPDATE: Lebanon received through its Washington embassy a proposal for a complete ceasefire within 24 to 48 hours from midnight Saturday to Sunday, possibly implemented gradually rather than declared, with President Joseph Aoun in direct US contact and an official rejection of buying time in a fragile, disrespected truce, while Prime Minister Nawaf Salam said the new element is greater US engagement, that Washington is the only party able to pressure Israel, and that the withdrawal-for-army-deployment reciprocity idea is on the table but not yet crystallized.
- Hezbollah hardened its line, with MP Hussein Hajj Hassan warning that the Pentagon-prepared 29 May Lebanon-Israel security track endangers the whole country and the party casting the US-brokered talks as a dead end, while the offer on the table amounts to a return to the pre-2 March arrangement in which Israel struck Hezbollah without reply, a formula the party will not renew.
- The general amnesty bill moved to the joint parliamentary committees on Tuesday with a general session penciled for next Thursday, amid continued boycotts and a sudden push that tracks post-Assad Damascus and the release of Islamists tied to the Syrian file.
- Health Minister Rakan Nasser el-Din told the World Health Assembly in Geneva that 116 Lebanese health workers have been killed and 263 wounded with ambulances and centers destroyed, and invited the WHO director general to Lebanon.
- Pope Leo XIV stressed Lebanon's unity and sovereignty and said he prays daily for the Lebanese and the churches of the Middle East, receiving Armenian Catholicos Aram I at the Vatican.
- Lebanese Forces leader Samir Geagea received the Syrian chargé d'affaires Iyad al-Hazzaa in Maarab in an introductory meeting, an early contact between the Christian party and post-Assad Damascus.

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## SYRIA

- The European Union extended Assad-era sanctions for another year to June 2027 while removing seven entities including the Syrian defense and interior ministries from its blacklist, a step it framed as deepening engagement with Damascus.
- Israeli artillery shelled agricultural land around Tarunja in the northern Quneitra countryside with three rounds, the latest in near-daily incursions into the Daraa and Quneitra countryside with no Syrian government response.
- Twenty-four Kurdish parties condemned the allocation of four seats to Kurds in the new People's Council formation as a political execution of Kurdish rights and a template for institutional exclusion.
- Displaced families began returning in numbers, 623 from the Kobani countryside to Afrin and residents to Umm al-Kaif west of Tal Tamr under the 29 January agreement between the Syrian Democratic Forces and the interim government, to destroyed homes and absent services.

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## PALESTINE

- UPDATE: Israeli naval forces intercepted 41 of the roughly 50 Global Sumud Flotilla vessels off Cyprus and detained around 345 activists from 39 boats, with 10 vessels still sailing and the nearest, Sirius, 145 nautical miles from Gaza, while the foreign ministers of ten states condemned the seizure and the UN demanded guarantees for the activists' safety.
- A nationwide general strike under the slogan "We block everything" shut parts of Italy in solidarity, with protests held outside the Greek foreign ministry in Athens.
- The Gaza toll reached 72,772 killed and 172,707 wounded since the start of the war, with strikes continuing during the 11 October ceasefire and a burial crisis as cemeteries fill and the cost of preparing a single grave reaches around 500 dollars.
- The Board of Peace overseeing Gaza reconstruction told the Security Council its roadmap had stalled over Hamas's weapons, empowerment of the proposed national committee and aid funding, with its chair urging Hamas to step aside and Hamas saying it is ready to hand civil administration to a national committee while demanding pressure on Israel.
- The Israeli military demolished residential blocks near the Gaza Yellow Line in the Faluja quarter of Jabalia camp in a continued displacement drive, as the UN cited indicators of ethnic cleansing in both Gaza and the West Bank.
- In the West Bank, settlers escorted by troops moved to rebuild the Kadim settlement in Jenin, one of four evacuated under the 2005 disengagement, amid 3,043 documented violations from January to April and the forced displacement of the Arab al-Khouli community near Qalqilya.

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## KEY REGIONAL EVENTS

- **UAE:** Iranian drone and missile attacks and the Hormuz chokehold have cut Emirati crude and gas exports by more than half, and Abu Dhabi has announced a new pipeline to bypass the strait and exited OPEC for higher long-term output, while tourism and conference revenue near 12 percent of the economy has fallen and the war has strained the stability model the country built itself on.
- **Saudi Arabia / Kuwait:** Foreign Minister Faisal bin Farhan and Kuwaiti counterpart Sheikh Jarrah Jaber Al-Ahmad Al-Sabah coordinated by phone on regional developments and joint security efforts, part of continuous Gulf consultation around the Iran file.
- **Iraq:** The 2026 budget faces three paths, a reduced five-to-six-month budget, a 2020-style borrowing law, or continuation under the one-twelfth spending rule, with the finance ministry saying salaries are secured despite the delayed government formation.
- **Iraq:** A dispute opened over the Anbar mass graves after clothing recovered at the Saqlawiya sites cast doubt on the Martyrs Foundation's attribution to the pre-2003 era, with the provincial council pressing for independent forensic testing.
- **Kurdistan Region:** Intensive moves to form the new regional cabinet and reactivate parliament saw Masrour Barzani receive a KDP delegation and the Kurdistan Islamic Union mediate between the KDP and PUK, as Nechirvan Barzani visited the Vatican and Italy on coexistence and Peshmerga unification.
- **Yemen / Houthis:** Abdulmalik al-Houthi delivered a speech on the latest developments and Houthi-organized mass marches across Sanaa, Marib, Hajjah, Taiz, Hodeidah and Lahj asserted readiness and solidarity with Gaza and Lebanon.

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## KEY INTERNATIONAL EVENTS

- The Trump-Xi summit in Beijing ended long on symbolism, with Xi warning that Washington's handling of Taiwan could lead to "conflicts" and pressing differences over the Iran war and trade against Trump's praise of his host.
- Russia struck Kyiv with drones and ballistic missiles, with the toll in one apartment building reaching 24 dead and 33 injured, and announced strategic nuclear-force exercises running 19 to 21 May.
- A mass shooting at an Islamic center in San Diego killed three worshippers, with two teenage suspected attackers later found dead by suicide.
- British Health Secretary Wes Streeting resigned from the Cabinet and is expected to challenge Prime Minister Keir Starmer after Labour's regional election losses, citing a leadership vacuum while crediting Starmer with keeping Britain out of the Iran war.
- The WHO declared an international health emergency over a Democratic Republic of Congo Ebola outbreak the Congolese health minister said may have killed 131 of 513 suspected cases, prompting the United States to tighten border screening and suspend some visa services.
- Alex Saab appeared before a Miami federal court on charges of laundering hundreds of millions

of dollars through US banks as a financial front for Nicolas Maduro, days after Venezuela handed him over.

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## MARKETS

- Oil fell about 2 percent on Tuesday after the strike was paused, with Brent for July down 3.01 dollars near 109 and US WTI for June down 1.38 to 107.28 and the more active July contract off 2 percent at 102.32, after both benchmarks hit two-week highs on Monday, while Kuwait Export Crude rose 60 cents to 124.63.
- Gulf bourses opened higher on Tuesday as the pause eased fears of a wider war.
- US spending on operations against Iran has passed 85 billion dollars over 79 days against the Pentagon's official 29 billion figure, with US gasoline up 51.4 percent and diesel up 53.4 percent since the war began.
- The US strategic petroleum reserve was drawn down sharply to its lowest level since July 2024 as supply worries persisted.
- Lebanon's fuel schedule raised 95-octane gasoline by 16,000 lira to 2,559,000 and 98-octane by 17,000 to 2,577,000, while cutting diesel by 10,000 to 2,244,000 and the gas cylinder by 54,000 to 1,444,000.
- Jerome Powell leaves the Federal Reserve on Friday after eight years, with Kevin Warsh confirmed as his successor.

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