

## DAILY BRIEFING

# The Dispatch

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## MAIN STORY: TEHRAN REVIEWS WASHINGTON'S COUNTER-OFFER AS PAKISTAN'S ARMY CHIEF JOINS THE MEDIATION

- Iran's Foreign Ministry said it is reviewing Washington's latest response to Tehran's proposal to end the Iran war, now in its 83rd day, with the message relayed through mediator Pakistan after several rounds of indirect exchanges. Ministry spokesperson Esmaeil Baghaei confirmed the review while voicing "great distrust" of the United States.
- Pakistan stepped up its mediation, with Interior Minister Mohsin Naqvi arriving in Tehran for the second time this week and army chief Field Marshal Asim Munir traveling to the Iranian capital Thursday for further consultations between Tehran and Washington.
- Trump said the Iranians have "one last chance" to reach an agreement and that he can wait "a few days" for "the right answers," while keeping open the option to resume attacks. He convened his national security team Monday evening for a briefing on military options and has acknowledged coming within an hour of ordering fresh strikes before pausing them.
- Vice President JD Vance said the talks are making "good progress" but described the United States as "locked and loaded" for an "option B" that would restart the military campaign if no deal emerges.
- Iran held to two conditions for any agreement, the unfreezing of Iranian assets blocked abroad and an end to the American blockade of Iranian ports. Washington has called Tehran's latest offer insufficient and warned that the war would resume absent an agreement.
- Israeli officials reacted with anger to a reported framework under which Iran and the United States would formally end the war and open 30 days of talks, a structure Israel assesses would leave Iran's nuclear and missile programs intact.
- US intelligence assessments indicate Iran restarted part of its drone production during the six-week ceasefire that began in early April and is reconstituting its military-industrial base faster than earlier estimates projected.

### STRATEGIC ASSESSMENT

The strike-or-deal binary that framed the past week has given way to a mediated review with no fixed expiry, and Pakistan's deepening involvement has turned Islamabad from message-carrier

into a party with its own stake in the result. Where the 20 May cycle read Trump's deadline as a hardening instrument, his statement that he can wait "a few days" for "the right answers" removes the fixed expiry and hands leverage to whichever side absorbs delay at lower cost. That side is Tehran, because US intelligence assessments place Iran's drone lines back in production during the April ceasefire and its military reconstitution ahead of earlier estimates, making delay a resource rather than a risk. Tehran is likely [55-80%] to keep the Pakistani channel open while holding to its conditions on asset unfreezing and the port blockade, declining the core US enrichment demand without ending the talks. An alternative reading, that Trump's pause masks a strike decision already taken and awaiting the visible failure of mediation, fits the Monday military-options briefing but not the tanker boardings that substitute interdiction for bombardment, and the marker to watch is whether Field Marshal Munir leaves Tehran with a written counter-offer or another deferral.

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## IRAN

- The Islamic Revolutionary Guard Corps warned that any renewed attack on Iran could expand into a wider regional conflict, claiming Tehran had not used its full military capabilities in earlier rounds of fighting. Foreign Minister Abbas Araghchi said Iranian forces would respond with "greater surprises" if combat resumes, and Deputy Foreign Minister Kazem Gharibabadi said Tehran remains prepared for escalation.
- Iran's Revolutionary Guard navy reported that 26 vessels, including oil tankers and container ships, crossed the Strait of Hormuz over 24 hours, the first traffic figures issued by the newly formed Persian Gulf Strait Authority. Tehran's Supreme National Security Council created the body to administer the waterway it has effectively closed and intends to toll.
- The US military boarded an Iranian-flagged oil tanker in the Gulf of Oman suspected of breaching the American blockade, the latest interdiction since Trump called off renewed strikes on Monday. US forces have boarded or disabled several tankers tied to Iranian crude smuggling across the Indian Ocean over the past month.
- IRGC commander General Ahmad Vahidi, elevated to the post after his predecessor was killed early in the war, has consolidated control over both Iran's military response and its negotiating posture, hardening Tehran's line in the talks with Washington.
- Iran executed two men convicted of armed rebellion and links to separatist groups, part of a wider crackdown on internal dissent since the war began.

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## ISRAEL

### C O R E G R O U P

- The Knesset passed a bill in preliminary reading to dissolve itself, advancing an early national election that current polling indicates Prime Minister Benjamin Netanyahu would lose. The vote followed the breakdown of coalition discipline over the ultra-Orthodox conscription bill.
- IDF manpower planning chief Shay Tayeb warned that ultra-Orthodox draft evasion could reach 90,000 eligible men and force a reduction of up to 10 percent in combat strength, as the Knesset debated the haredi exemption legislation that fractured Netanyahu's coalition.

- National Security Minister Itamar Ben-Gvir posted footage of himself taunting bound detainees from the Gaza-bound aid flotilla, shouting nationalist slogans at one restrained activist. The video drew condemnation from multiple foreign governments and from Israeli officials, Netanyahu among them.
- The US Treasury sanctioned organizers of the Gaza-bound flotilla, one day before US Ambassador Mike Huckabee said Ben-Gvir had “betrayed dignity” in the taunting video.
- Israeli forces detained flotilla activists at Ashdod Port after the navy intercepted the Gaza-bound vessels, and a Haifa court ordered 11 boats from the October 2025 fleet transferred to state ownership. At least 87 detained activists began a hunger strike.

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## LEBANON

- Israeli airstrikes on southern Lebanon killed at least eight people on Wednesday, and the death toll from the strike on Deir Qanoun al-Nahr rose to 12, including three children and four women of a single family. Lebanon’s cumulative war death toll passed 3,000.
- Hezbollah said it has fought Israeli troops for several days around Haddatha in the Bint Jbeil district, where the IDF has used intensive airstrikes to dismantle the group’s defensive positions.
- An explosive drone seriously wounded the commander of the IDF’s 401st Armored Brigade, Colonel Meir Biderman, in the western sector of southern Lebanon, alongside two reservists who were also evacuated for treatment.
- A reported security framework under negotiation sets timetables for disarming Hezbollah and other armed factions in exchange for reciprocal Israeli steps, including the release of Lebanese detainees, a reduction in the zones Israel strikes, and a phased withdrawal.
- Prime Minister Nawaf Salam said the government will not allow any party to bypass the state and reaffirmed the principle of exclusive state control of weapons, citing the Taif Accord and the cabinet’s ministerial statement.
- Hezbollah MP Mohammad Raad warned that the government’s conduct in the negotiations would lead Lebanon “to disasters,” accusing the authorities of adopting Israel’s narrative against the resistance.
- Parliament Speaker Nabih Berri postponed a session set to debate the general amnesty draft law after Sunni-led protests against it spread across Lebanon, citing the need for national consensus over a divisive measure.

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## SYRIA

# C O R E G R O U P

- Syrian authorities seized 25 million Captagon pills and arrested a seven-member trafficking network, including its leader, the latest in a series of large interdictions since the government intensified anti-narcotics operations.
- President Ahmed al-Sharaa will represent Syria as a guest nation at the G7 summit in France next month, the country’s first participation in the forum.

- A car bomb killed a soldier near a Defense Ministry building in Damascus, with investigators attributing the blast to an explosive device planted in a vehicle.
- The European Union completed the removal of economic sanctions on Syria following the 11 May high-level political dialogue in Brussels, backing the country's reconstruction and recovery.

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## PALESTINE

- Israeli airstrikes hit multiple areas of Gaza overnight, killing Palestinians in Rafah, Khan Yunis, and Beit Lahia and deepening the humanitarian collapse across the territory.
- The US pressed Palestinian leaders to withdraw their candidate for a UN General Assembly vice-presidency, part of Washington's campaign to limit Palestinian standing in multilateral bodies.
- The Board of Peace overseeing the Gaza ceasefire will ask the UN Security Council to press Hamas to disarm, naming the group's refusal to surrender its weapons as the principal obstacle to reconstruction, which remains stalled seven months after the ceasefire.
- The US lifted sanctions on UN special rapporteur Francesca Albanese, a week after a federal judge ruled the measures restricted her freedom of speech.
- Israeli forces have killed an average of one Palestinian minor each week in the northern West Bank since the January 2025 operation, with 70 minors killed to date, while settlers placed new structures on seized land near Hebron.

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## KEY REGIONAL EVENTS

### Iraq

- The UAE demanded that Iraq "immediately and unconditionally" halt hostile acts emanating from its territory, days after a drone launched from Iraq struck the Barakah nuclear plant. Gulf capitals are pressing Baghdad over a series of drone attacks attributed to Shia armed groups.
- Iraq's week-old government under Prime Minister Ali Al-Zaidi is facing deep parliamentary fractures, with alliances inside the ruling Shia Coordination Framework realigning after the 14 May confidence vote that produced only a partial cabinet.

### Saudi Arabia

- Foreign Minister Faisal bin Farhan praised Trump for giving negotiations a chance to end the Iran war, aligning Riyadh with the Gulf push that secured the strike pause.

### Jordan

- The Hashemite Charity Organization dispatched a fifth relief convoy to Lebanon, 25 trucks carrying medicine, infant formula, and food, coordinated with the World Food Programme.

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## KEY INTERNATIONAL EVENTS

- House Democrats moved closer to passing an Iran war powers resolution as their last holdout, Jared Golden of Maine, said he intends to vote yes, with at least one Republican signaling a possible shift. The Senate has already advanced a parallel measure to curb Trump's authority to wage war on Iran.
- NATO foreign ministers convened in Helsingborg, Sweden, with the Strait of Hormuz and the Iran war competing with Ukraine for the agenda. Secretary General Mark Rutte said the planned withdrawal of 5,000 US troops from Europe would not degrade alliance defenses.
- Poland welcomed US clarification that the decision not to deploy 4,000 troops to the country was a temporary delay rather than a withdrawal.
- The European Union approved a tariff deal with the United States capping levies on most EU exports at 15 percent, averting a clash ahead of Trump's 4 July deadline.
- A reported US and Israeli plan to depose Iran's leadership had at one point considered installing former president Mahmoud Ahmadinejad, who governed from 2005 to 2013 before breaking with Supreme Leader Ali Khamenei.
- Russian President Vladimir Putin met Xi Jinping in Beijing, with the two leaders affirming trade ties and strategic cooperation.

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## MARKETS

- Brent crude rose 1.2 percent to \$106.29 a barrel and US West Texas Intermediate gained 1.3 percent to \$99.55 on Thursday, paring losses after both benchmarks fell more than 5.6 percent on Wednesday on shifting signals from the US-Iran talks.
- Gold steadied near \$4,530 an ounce after falling Wednesday to its lowest level since 30 March, as markets weighed the prospect of a US-Iran deal against persistent inflation and elevated interest rates.
- US retail gasoline topped \$4 a gallon in all 50 states, with the national average up 53 percent since the war began in late February.
- Tankers carrying roughly 6 million barrels of crude exited the Strait of Hormuz, including the Chinese-flagged Yuan Gui Yang and Hong Kong-flagged Ocean Lily, which had waited in the Gulf for more than two months.
- Saudi Arabia will burn more crude for power generation this summer as gas output from its oilfields falls, with April fuel oil imports up 86 percent year on year.
- Britain delayed part of a new sanctions package on Russian oil to shield consumers from the cost-of-living squeeze caused by the effective closure of the Strait of Hormuz.
- Britain finalized a trade deal with the Gulf Cooperation Council valued at more than \$5 billion, presenting it as a signal of investor confidence amid regional instability.
- The European Union is bracing for downgraded economic forecasts driven by the war and high

energy prices, while US Treasury Secretary Scott Bessent called the inflation spike “transient” and tied to the conflict’s end.

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