

Middle East Situation

Information Cut-Off: 1200h (BST), 11 May 2026

Executive Summary

President Trump has rejected an Iranian response to the US proposal to end the conflict.

Iranian projectiles have been detected and intercepted in Kuwaiti, Qatari and Emirati territory in the last 48 hours.

The Iranian military has made renewed threats to any country that launches attacks on Iran, or supports US-imposed sanctions on Tehran.

Diplomacy

The Iranian government was considering the US 14-point proposal over the weekend. Yesterday afternoon (10 May) it sent its official response to Washington: it reportedly insisted on the US guaranteeing against further aggression, paying war reparations (reportedly as much as USD270bn), releasing seized Iranian assets and accepting Iranian sovereignty over the Strait of Hormuz.

President Trump quickly rejected the response in a social media post, calling it “totally unacceptable”, “inappropriate” and accusing the Iranian government of “playing games”, without giving further details about his specific objections.

Prime Minister Netanyahu stated yesterday that the conflict with Iran cannot be concluded until Iranian nuclear facilities and capabilities are completely dismantled.

The Pakistani government has publicly announced that it intends to continue with its mediation efforts between the US and Iran.

Iran

On Saturday evening (09 May), the Islamic Revolutionary Guard Corps (IRGC) said that it has its missiles and drones locked on US and enemy targets and ships in the region, ready for the order to fire. The Iranian army echoed these threats yesterday (10 May), saying that any future attacks on Iran would result in significant responses with “new weapons” in “new arenas”. It has warned that countries complying with US-imposed sanctions against Tehran will face “difficulties” travelling through the Strait of Hormuz.

Satellite imagery appeared to show a large oil leak near Kharg Island, according to Iranian state media, but this has been denied by the Iranian Oil Terminals Company.

Last night the Iranian army reported that it had intercepted an “enemy drone” over the south-western region.

Yesterday, Iranian authorities reportedly executed a man accused of espionage for Mossad and the CIA, according to Iranian media.

Israel

On Saturday night (09 May), a demonstration was held in Tel Aviv against the government and the attacks on Lebanon. The size of the protest is unclear, but there was no reported violence.

United States

A Democratic senator has warned that US munitions have been seriously depleted during the Iran conflict, and may take years to restore. This has been denied by the US Defence Secretary Pete Hegseth.

Regional

Lebanon

Over 20 people were killed by Israeli attacks on Lebanon on Saturday (09 May), including missile launches and air strikes, in what was reported as a significant escalation of strikes, after the Israeli military had ordered the evacuation of nine settlements in southern Lebanon. On Saturday evening, Hezbollah claimed that its militants had launched 22 rocket / artillery / drone strikes on Israeli military targets in southern Lebanon and northern Israel, with one person reported killed and 13 injured. Attacks on Lebanon continued yesterday (10 May) on towns across southern Lebanon, with a power station shelled in Nabatieh governorate. Israel claimed to have hit more than 20 Hezbollah targets yesterday, including

headquarters, armouries and military bases. Conflict between Israeli soldiers and Hezbollah militants has continued in the border area, with one Israeli soldier reportedly killed last night. Strikes on southern Lebanese towns have continued this morning (11 May), and the Israeli military has issued evacuation warnings for another nine settlements.

The third round of Israel-Lebanon talks are scheduled for 14-15 May in Washington. Hezbollah will not be participating directly.

Strait of Hormuz

The UK government said on Saturday that it is sending a Royal Navy destroyer to the Middle East to take part in a UK-France led mission to protect shipping in the strait: the operation will only begin once the conflict has ended, according to the UK prime minister. The Iranian government has said that the presence of European warships in the region would lead to a “decisive and immediate response”. In response, President Macron said yesterday that a deployment was not being considered, but that the French Navy was ready if needed.

A gas carrier, travelling to Port Qasim in Pakistan, has successfully crossed the strait for the first time since the start of the war, according to online navigational data. Yesterday, a second vessel, a Panama-flagged bulk carrier bound for Brazil, also transited the strait successfully.

Yesterday, two very large crude carriers also transited the strait, having switched off their trackers to avoid the Iranian military.

Kuwait

The Kuwaiti military reported yesterday morning that it had detected “hostile drones” in its airspace.

Qatar

A bulk carrier travelling from Abu Dhabi to Qatar was reportedly hit by a drone yesterday morning, 23nm north-east of Doha, causing a small fire on board. The government in Doha has called for an investigation.

Saudi Arabia

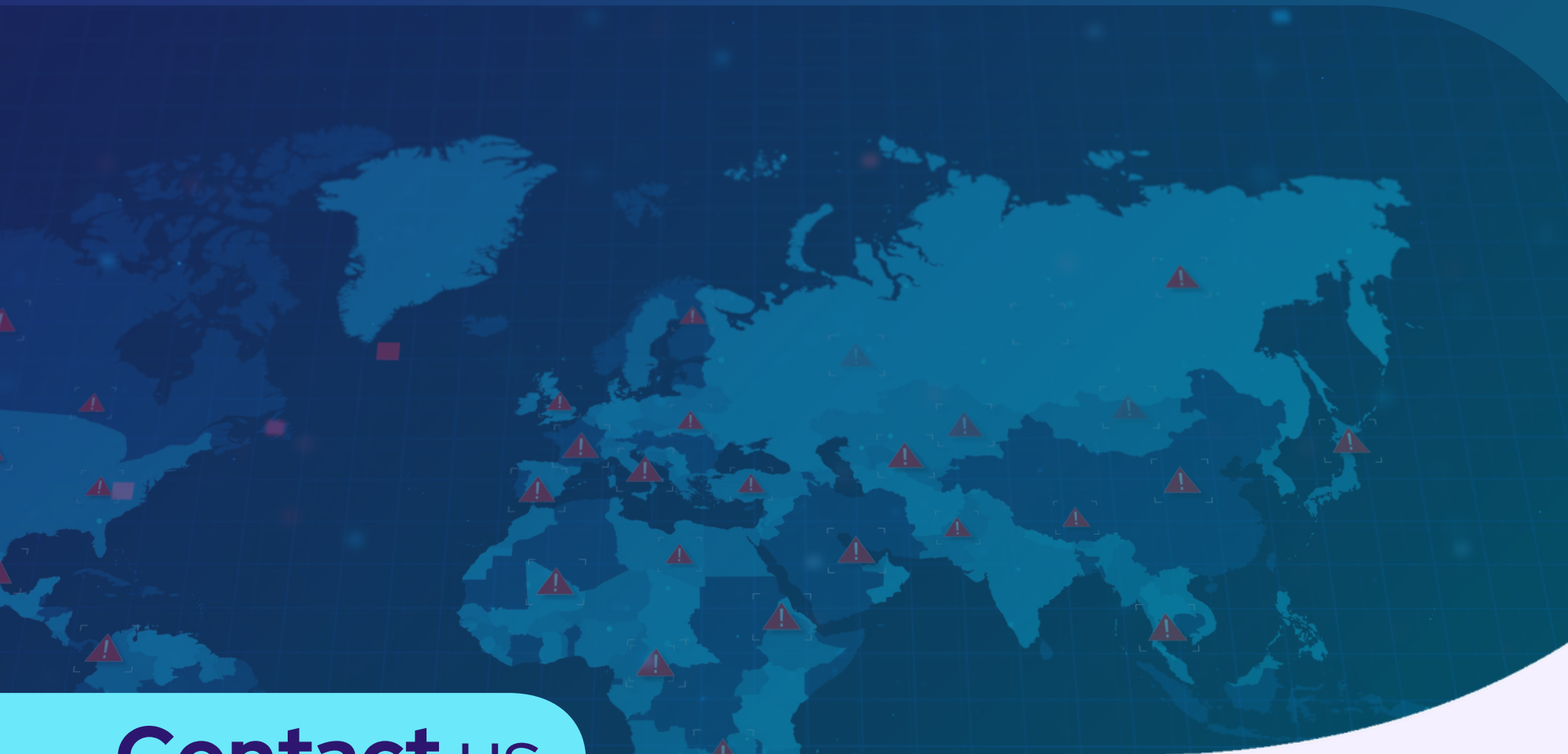
Saudi Aramco reported a net profit of USD32.5bn in Q1 2026, a 25 percent increase on Q1 2025. This has been attributed to the East-West Crude Oil Pipeline, which has reached maximum capacity and circumvents the Strait of Hormuz.

United Arab Emirates

Yesterday morning, Emirati air defences intercepted two Iranian drones. No casualties were reported.

Advice

- Do not travel to Lebanon, especially south of the Litani River, Dahiye in Beirut, and in the Beqaa Valley.
- Reconsider travel to the Middle East, especially Israel, Iran and Iraq, but also the wider Gulf region.
- Remain aware of ongoing tensions, given the possibility of a sudden resumption in fighting.
- Monitor instructions from local authorities and any national embassy guidelines.
- Avoid any demonstrations or gatherings in the region.
- Globally, reconsider travel to any locations with links to Israel or Judaism.
- If you need further support, or wish to discuss options for evacuation, call NGS.



Contact us

Operational assistance: +44 207 183 8910 / ops@northcottglobalsolutions.com

Bespoke reporting or security-related advice: risk@northcottglobalsolutions.com

24/7 assistance: +44 2071 8389 36 / tracking@northcottglobalsolutions.com