

Information Cut-Off: 1145h (BST), 08 July 2026

Executive Summary

Overnight (07–08 July), US conducted airstrikes on Iran, citing an Iranian attack on commercial vessels in the Strait of Hormuz as a violation of the ceasefire agreement. The strikes were the largest since the ceasefire took effect in April. This morning, President Trump said, "I think it's over," referring to the Memorandum of Understanding (MoU) reached with Iran in June. President Trump added that negotiations may continue; the US has not formally withdrawn from the MoU, which halted fighting and reopened the Strait of Hormuz for maritime traffic.

In the last week, Israel has conducted several airstrikes in southern Lebanon, concentrating on targets within or travelling towards its security/buffer zone.

Conflict

The US conducted airstrikes on Iran overnight (07–08 July) and revoked Iran's ability to sell oil after tankers were attacked in the region earlier this week. The attacks included over 60 strikes on small boats, alongside strikes on Iranian ports and military bases. Iranian state media reported strikes on Kharg Island, which cannot be independently verified; the island is Iran's primary oil export hub.

Iranian drone and missile attacks triggered sirens in Bahrain and Kuwait this morning (08 July), with Iranian officials saying it was targeting US military infrastructure in retaliation. Sirens in Bahrain have been triggered at least three times today. Iran's Islamic Revolutionary Guard Corps has said it is targeting the US Fifth Fleet base at NSA Bahrain and the Ali Al-Salem airbase in Kuwait, and that additional unspecified retaliations will occur in the coming days. Kuwaiti authorities have reported damage to several power lines from shrapnel in recent Iranian strikes, although no disruption to the power supply has been reported.

Diplomacy

The US concluded talks with Iran last Wednesday (01 July) with no signs of progress for a lasting peace deal. Both sides agreed to resume talks after the funeral of Iran's previous supreme leader, the late Ayatollah Ali Khamenei. The state funeral will run until tomorrow (09 July).

On Monday (06 July), President Trump warned that the US would either reach a deal with Iran or it would "finish the job". President Trump added that the US can "knock down their bridges in one hour, we can knock out their energy supply". This morning (08 July), President Trump expressed frustration at Iran's continued hostilities towards vessels in the region, and in referring to the MoU, said "I think it's over", and "It's just a waste of time dealing with them". He added that talks will nevertheless continue with Iran.

This morning, the Iranian parliamentary speaker and lead negotiator, Mohammad Bagher Ghalibaf, accused the US of "major violations" of the MoU, and said, "The era of bullying and extortion is over". Iranian officials have said the attacks, the reimposition of sanctions and continued Israeli operations in Lebanon are violations of the MoU.

The UN Security Council convened an emergency session last Thursday (02 July) following Iranian attacks on Bahrain and Kuwait over the previous days. Representatives denounced the attacks and called for unimpeded maritime movement in the Strait of Hormuz.

Iran and Qatar resumed maritime trade on Sunday (05 July), for the first time in five months.

Lebanon

The Israeli military conducted air strikes on at least 10 Hezbollah positions in southern Lebanon last Thursday (02 July), in retaliation for Hezbollah attacks that left one soldier injured from small arms fire in Bint Jbeil. Impacted areas from Israeli strikes include Bint Jbeil, Beit Yahoun, Kounine and Baraashit.

On Saturday (04 July), Israeli forces shot and killed a Hezbollah militant in Majdal Zoun, in the Israeli security/buffer zone.

On Sunday (05 July), Israeli air strikes targeted Hezbollah militants in al-Aaqaide, near Nabatieh. The Israeli military justified the strikes by saying the militants were near the security/buffer zone and posed a threat to Israeli forces in the area. Later that day, additional strikes were reported near the Ali Taher ridge in southern Lebanon.

On Monday (06 July), Israeli airstrikes on a car killed at least four people in Nabatieh al-Fawq. The Israeli military said the vehicle was heading for Israel’s security/buffer zone, and the suspects posed a threat to IDF soldiers. Lebanese media claimed the victims included a school teacher, a labourer and a domestic worker. Overnight (07-08 July), Israeli airstrikes have been reported in the Bint Jbeil district.

Regional

Saudi Arabia

Saudi authorities are considering expanding the Red Sea coast pipeline, which would allow oil to be exported without transiting the Strait of Hormuz.

Strait of Hormuz

Iran has attacked at least three vessels transiting the Strait of Hormuz in recent days. On Monday (06 July), a drone struck a tanker 8nm east of Limah, Oman. Yesterday (07 July), two tankers were attacked by drones, causing unspecified structural damage but no confirmed injuries. The attacks prompted at least four oil and gas tankers to abort transit of the strait today (08 July).

Last Thursday (02 July), the Iranian military warned vessels they must use approved routes or face a “forceful response”.

Travel

Aviation

The airspace over Iran closed overnight following US strikes but has largely reopened, with flights at Tehran’s Imam Khomeini Airport resuming from 0500h local time.

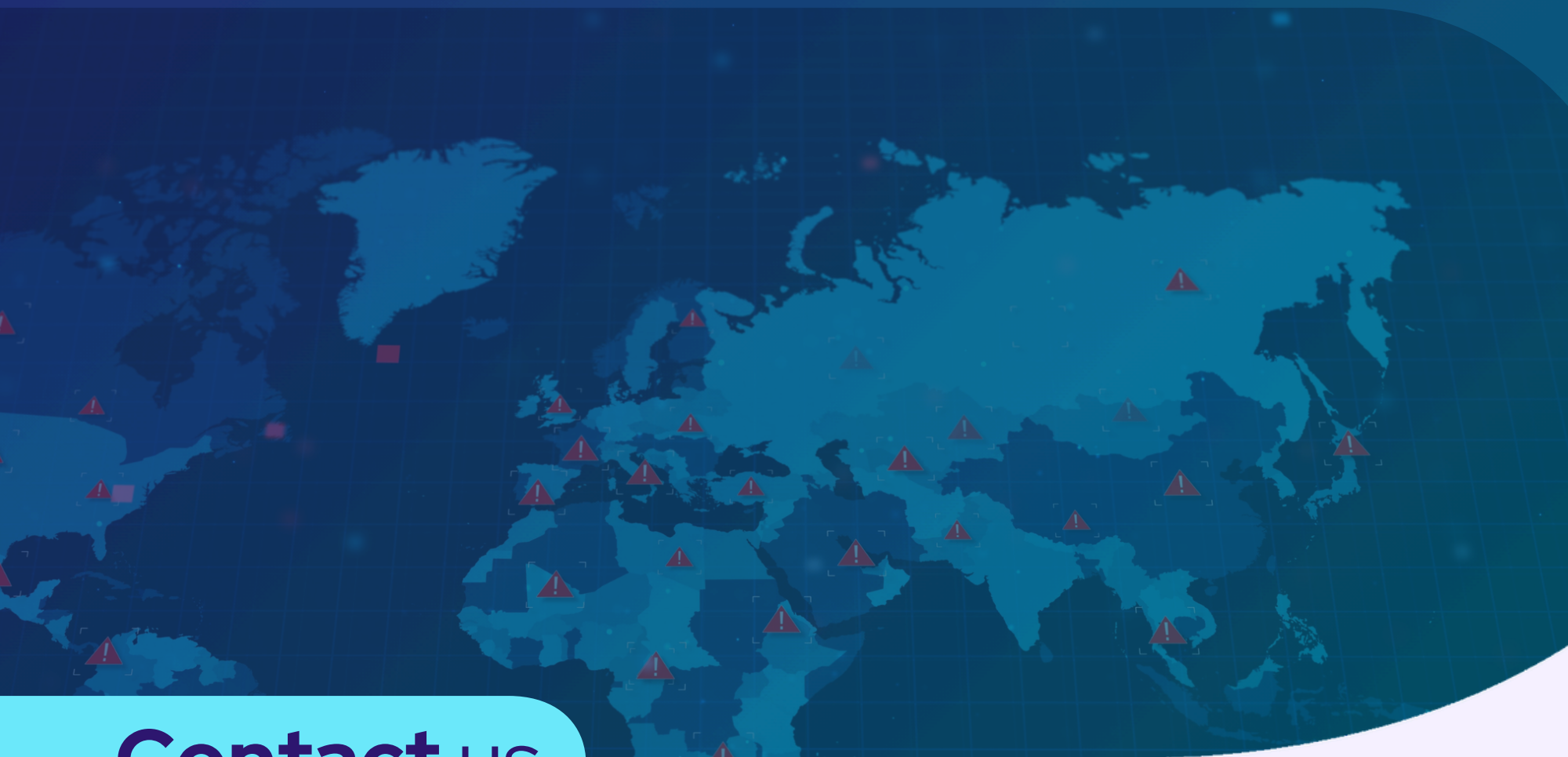
The European Union Aviation Safety Agency has advised airlines to avoid Iranian and Iraqi airspace until 31 August, citing US airstrikes.

Cathay Pacific announced last Thursday (02 July) that it will resume its Middle East operations from 01 September, including flights to Dubai and Riyadh. Cathay Cargo will resume freighter services to Riyadh from 01 August.

US airlines spent over USD6.6bn on jet fuel in May, 84 per cent higher than figures from May 2025.

Advice

- Reconsider travel to Israel, Iran and Iraq.
- Do not travel to Lebanon, especially south of the Litani River, Dahiye in Beirut, and in the Beqaa Valley.
- 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.



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