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Ceasefire Unravels – SITREP #41:

July 10, 2026

F-2026-07-10a

Classification: TLP:CLEAR

Criticality: High

Intelligence Requirements: Geopolitics

July 10, 2026

Scope Note

*ZeroFox Intelligence is derived from a variety of sources, including—but not limited to—curated open-source accesses, vetted social media, proprietary data sources, and direct access to threat actors and groups through covert communication channels. Information relied upon to complete any report cannot always be independently verified. As such, ZeroFox applies rigorous analytic standards and tradecraft in accordance with best practices and includes caveat language and source citations to clearly identify the veracity of our Intelligence reporting and substantiate our assessments and recommendations. All sources used in this particular Intelligence product were **identified prior to 8:20 AM (EDT) on June 10, 2026**; per cyber hygiene best practices, caution is advised when clicking on any third-party links.*

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| Key Findings

- U.S. President Donald Trump and Iranian leaders have both declared that their ceasefire is over following a new series of U.S. airstrikes in response to Iranian attacks on ships in the Strait of Hormuz (SoH). Despite this, President Trump stated that talks will continue, and ZeroFox assesses there is only a roughly even chance that the Memorandum of Understanding (MOU) has collapsed.
- Iran likely views irregular attacks on ships in the SoH—particularly those transiting near Oman—as central to gaining international recognition over its control of the strait.
- Iran will likely continue threatening to abandon negotiations to extract concessions from the United States.
- The broader uncertainty is very unlikely to end soon, and the most likely near-term scenario is a version of the pre-MOU ceasefire that breaks down periodically.

| Latest Details

On July 7, 2026, Iranian forces damaged several oil and gas tankers reportedly transiting the SoH using a route near Oman that avoided Iranian waters.¹ Hours later, the U.S. Central Command (CENTCOM) reported 80 airstrikes on Iranian positions.² According to CENTCOM, the U.S. military struck an additional 90 Iranian targets the next day,³ while Iran reportedly targeted U.S. positions in the nearby Gulf states of Bahrain, Qatar, and Kuwait—as well as Jordan, which has rarely been targeted during the war.⁴

- While the MOU in place since June 17 has seen intermittent violations, the latest strikes were notable for their larger scale and were accompanied by statements from both sides casting doubt on negotiations.
- On July 8, President Trump said the United States could reimpose its naval blockade on Iran and begin targeting critical infrastructure and Iran's Kharg Island,⁵ from which most of its oil exports depart.
 - July 9 targets reportedly included a railroad bridge serving the capital of Tehran and a nuclear plant, indicating a shift toward targeting critical infrastructure.⁶ However, the U.S. naval blockade has not been reinstated.

Intermittent Conflicts

Similar bouts of renewed hostilities have occurred before, including from June 25–29 (just days after the MOU was signed). Those events were sparked by Iran again targeting ships using an alternative transit route proposed by Oman, which brings commercial vessels near the Omani side of the SoH.⁷

¹ [hXXps://www.reuters\[.\]com/world/middle-east/four-oil-gas-tankers-turn-back-hormuz-strait-after-vessel-attacks-2026-07-08/](https://www.reuters.com/world/middle-east/four-oil-gas-tankers-turn-back-hormuz-strait-after-vessel-attacks-2026-07-08/)

² [hXXps://www.centcom\[.\]mil/MEDIA/PUBLIC-RELEASES/Article/4535772/us-forces-complete-new-round-of-retaliatory-strikes-against-iran/](https://www.centcom.mil/MEDIA/PUBLIC-RELEASES/Article/4535772/us-forces-complete-new-round-of-retaliatory-strikes-against-iran/)

³ [hXXps://www.centcom\[.\]mil/MEDIA/PUBLIC-RELEASES/Article/4538814/us-forces-complete-another-round-of-strikes-against-iran/](https://www.centcom.mil/MEDIA/PUBLIC-RELEASES/Article/4538814/us-forces-complete-another-round-of-strikes-against-iran/)

⁴ [hXXps://www.reuters\[.\]com/world/middle-east/iran-says-it-hits-us-military-targets-gulf-prepares-bury-slain-leader-2026-07-09/](https://www.reuters.com/world/middle-east/iran-says-it-hits-us-military-targets-gulf-prepares-bury-slain-leader-2026-07-09/)

⁵ [hXXps://www.aljazeera\[.\]com/news/2026/7/8/trump-says-us-may-take-over-kharg-island-heres-what-you-need-to-know](https://www.aljazeera.com/news/2026/7/8/trump-says-us-may-take-over-kharg-island-heres-what-you-need-to-know)

⁶ [hXXps://www.nytimes\[.\]com/live/2026/07/09/world/iran-war-us-trump](https://www.nytimes.com/live/2026/07/09/world/iran-war-us-trump)

⁷ [hXXps://www.cbsnews\[.\]com/live-updates/iran-us-war-strait-of-hormuz-trump-nato/](https://www.cbsnews.com/live-updates/iran-us-war-strait-of-hormuz-trump-nato/)

- Tracking data since the MOU was signed shows vessels are hugging the coastlines of either Iran or Oman to traverse the SoH. The primary internationally recognized shipping lane, known as the traffic separation scheme, remains unusable due to the threat of naval mines.⁸

During this period, Iran cancelled scheduled talks on negotiating a longer-term agreement on June 28, only to reopen them June 30 after receiving concessions from the United States.⁹

- The United States reportedly agreed to lift its naval blockade immediately rather than over 30 days and pay Iran USD 3 billion from its own unfrozen funds after talks were suspended on June 28.¹⁰
- Iranian negotiators will likely leverage disputes over SoH administration as a pretext to threaten a walkout or prolong negotiations going forward.

SoH Management

The ambiguous wording of the MOU is almost certainly contributing to the uncertainty surrounding the new management of the SoH. MOU provision #5 (of 14) specifies Iran will impose no tolls for “60 days only.”¹¹ Clause 5 also stipulates Iran and Oman will work together to determine the longer-term management of SoH commercial shipping, with consultation from other Gulf nations.

- The United States has likely interpreted this clause to mean there will be toll-free and secure shipping along the Omani route. Iran has likely interpreted the clause to mean it has the authority to manage the entirety of the SoH. Iran all but certainly intends to implement a toll system over the medium term.

⁸ [hXXps://www.bloomberg\[.\]com/news/newsletters/2026-06-18/hormuz-is-open-but-shipowners-still-have-doubts-about-safety](https://www.bloomberg.com/news/newsletters/2026-06-18/hormuz-is-open-but-shipowners-still-have-doubts-about-safety)

⁹ [hXXps://www.politico\[.\]eu/article/us-and-iran-agree-to-resume-talks-after-weekend-strikes/](https://www.politico.eu/article/us-and-iran-agree-to-resume-talks-after-weekend-strikes/)

¹⁰

[hXXps://www.firstpost\[.\]com/world/doha-talks-deliver-first-major-win-as-us-iran-agree-on-3-billion-fund-release-direct-hotline-14028160.html](https://www.firstpost.com/world/doha-talks-deliver-first-major-win-as-us-iran-agree-on-3-billion-fund-release-direct-hotline-14028160.html)

¹¹ [hXXps://www.cnn\[.\]com/2026/06/17/middleeast/us-iran-war-mou-text-intl](https://www.cnn.com/2026/06/17/middleeast/us-iran-war-mou-text-intl)

Iran issued a formal statement denouncing the Omani-proposed transit route as unacceptable and perilous.¹² Iran's actions were all but certainly aimed at coercing vessels to use the Iranian portion of the strait and establishing long-term deterrence against the use of alternative routes.

- Iran likely calculates that threats and continued attacks on vessels will deter the use of such alternative transit routes, thereby leaving Iran as the de facto controller of commercial shipping in the SoH. Iran likely believes this level of SoH control serves as a deterrent against future aggression of the scale seen during Operation Epic Fury.

Traffic through the Omani side of the SoH dropped to zero on July 9, and only a small number of small vessels transited via the Iranian side.¹³ Because Iran has shown a repeated ability to strike ships transiting via the Omani side, a long-term return to pre-war levels of shipping in the SoH is very unlikely without further clarification on MOU details.

Conclusion

Another multi-day exchange of fire followed by a tenuous truce is more likely than a return to the pre-ceasefire status quo. The United States almost certainly has military options to further degrade Iran's ability to threaten commercial shipping in the SoH; however, such efforts are unlikely to succeed in the short term, given that months of heavy fighting has failed to curb the Iranian threat. Iran very likely maintains the ability to elevate the economic costs for the United States and its Gulf allies, which likely contributed to them entering into negotiations in the first place. The early economic success of the MOU, which saw oil prices return to pre-war levels, makes it unlikely that the United States will expand the conflict in the long term. Because the broader uncertainty is unlikely to end soon, the most likely near-term scenario is a version of the pre-MOU ceasefire that breaks down periodically while keeping economic costs manageable.

¹² <https://time.com/article/2026/06/26/strait-hormuz-iran-strike-vessel-un-escort-shipping-oil-trump/>

¹³ <https://www.bloomberg.com/news/articles/2026-07-09/hormuz-traffic-grinds-to-a-near-halt-as-ceasefire-under-threat>

| Appendix A: Traffic Light Protocol for Information Dissemination

	Red	Amber
WHEN SHOULD IT BE USED?	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties and could lead to impacts on a party's privacy, reputation, or operations if misused.	Sources may use TLP:AMBER when information requires support to be effectively acted upon but carries risks to privacy, reputation, or operations if shared outside of the organizations involved.
HOW MAY IT BE SHARED?	Recipients may NOT share TLP:RED with any parties outside of the specific exchange, meeting, or conversation in which it is originally disclosed.	Recipients may ONLY share TLP:AMBER information with members of their own organization and its clients, but only on a need-to-know basis to protect their organization and its clients and prevent further harm. Note that TLP:AMBER+STRICT restricts sharing to the organization only.
	Green	Clear
WHEN SHOULD IT BE USED?	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations, as well as with peers within the broader community or sector.	Sources may use TLP:CLEAR when information carries minimal or no risk of misuse in accordance with applicable rules and procedures for public release.
HOW MAY IT BE SHARED?	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community but not via publicly accessible channels.	Recipients may share TLP:CLEAR information without restriction, subject to copyright controls.

Appendix B: ZeroFox Intelligence Probability Scale

All ZeroFox intelligence products leverage probabilistic assessment language in analytic judgments. Qualitative statements used in these judgments refer to associated probability ranges, which state the likelihood of occurrence of an event or development. Ranges are used to avoid a false impression of accuracy. This scale is a standard that aligns with how readers should interpret such terms.

Almost No Chance	Very Unlikely	Unlikely	Roughly Even Chance	Likely	Very Likely	Almost Certain
1-5%	5-20%	20-45%	45-55%	55-80%	80-95%	95-99%